

MESSAGE FROM THE CEO

Dear CFP® Professionals Family,

It gives me immense pleasure to connect with you through the October 2025 Edition of FPSB India's Newsletter, a month that has been nothing short of extraordinary for our community and for the financial planning profession in India.

October has always been special for us, with World Financial Planning Day (WFPD) serving as a global reminder of our collective responsibility to champion financial literacy and empower individuals to make informed financial decisions. This year, FPSB India transformed WFPD into a nationwide movement, one that resonated across campuses, corporates, communities, and digital platforms. With over 60 impactful initiatives, 7,000+ participants, and support from partners, institutions, and industry leaders, the momentum we've built together is truly inspiring.

We have also noted that the "Bell Ringing" ceremony which was started by FPSB India in 2022 to celebrate the WFPD has now received global recognition and is being adopted around the world.

I am also delighted to share several meaningful partnerships and milestones achieved this month. Our recent program launches and collaborations with leading institutions such as IIM Bangalore, SIMSREE, IIM Ahmedabad, and IDFC FIRST Bank reflect our commitment to expanding the reach of high-quality financial planning education.

These initiatives, along with our expanding academic engagements, corporate partnerships, and digital outreach campaigns, reinforce a powerful truth:

Financial planning is for everyone and CFP® professionals are at the heart of this movement.

As we continue to grow, our focus remains steadfast on upholding the integrity of the CFP® certification, elevating professional standards, and fostering an ecosystem where learning, ethics, and client-centricity thrive. I encourage each of you

to keep engaging, contributing, and amplifying the message of responsible financial planning in your communities.

I also solicit your contributions for our Journal, by way of articles addressing areas of professional interest and even ideas for making our journal more useful and attractive for its readers.

Thank you for your unwavering commitment to this profession and to FPSB India. Your passion, expertise, and leadership continue to inspire us every day.

Warm regards,



Chandrakant Sureka

Chief Executive Officer, FPSB India

LATEST

UPDATES & DEVELOPMENTS

FPSB India and IIM Bangalore Join Hands to Foster Excellence in Financial Planning Education

FPSB India is delighted to announce the signing of an MoU with the Executive Education team at the Indian Institute of Management Bangalore (IIMB) for an upcoming collaborative program, marking another milestone in advancing financial education in India.

The MoU was signed in the presence of Prof. Bharat Bhasker, Director, IIM Bangalore, and represents a shared commitment to fostering academic excellence and professional development in financial planning.

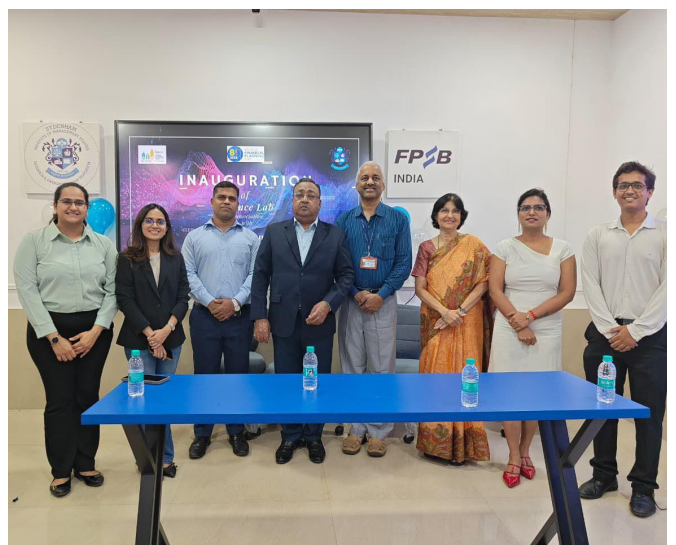
Chandrakant Sureka, CEO, FPSB India, addressed the gathering and formalized the partnership, with valuable support and guidance from Teena Rawal, Head of Business Development. This collaboration, renewed with a strengthened vision, beautifully aligns with the spirit of World Financial Planning Day 2025, reinforcing our collective mission to empower individuals and professionals through quality financial education.



SIMSREE Unveils its New Finance Lab to Foster Experiential Learning with FPSB India

SIMSREE, in collaboration with FPSB India, officially launched its first finance batch with a ceremonial lamp lighting by dignitaries including Dr. Shriniwas Dhure (Director), Dr. Sangeeta Pandit, and former registrar Dr. M.A. Khan. FPSB India Team Members, Chandrakant Sureka,

Teena Rawal- Head of Business Development, Prashant Dhuri - Sr. Manager – Operations & Samikshya P, Mgmt. Trainee also participated in the ceremony. The event was aligned with WFPD celebrations, and the campus was beautifully decorated to mark the occasion.



FPSB India Welcomes IDFC FIRST Bank as an Approved Corporate Partner

FPSB India is delighted to announce its strategic partnership with IDFC FIRST Bank, formalized through the signing of a Memorandum of Understanding (MoU) to advance financial planning excellence across India. This collaboration aims to upskill IDFC FIRST Bank employees, create new career pathways for CFP® professionals, and launch joint initiatives to strengthen the financial planning ecosystem.

The MoU was signed in the presence of Rahul Singh, Head – Wealth Management, Prakriti Upadhyay, and Pratik Sankhe from IDFC FIRST Bank, along with Chandrakant Sureka, CEO, Teena Rawal, Head of Business Development, Rajesh Singh - Regional Manager- Business Development, and Sharath Nambiar, Mgmt. Trainee representing FPSB India.

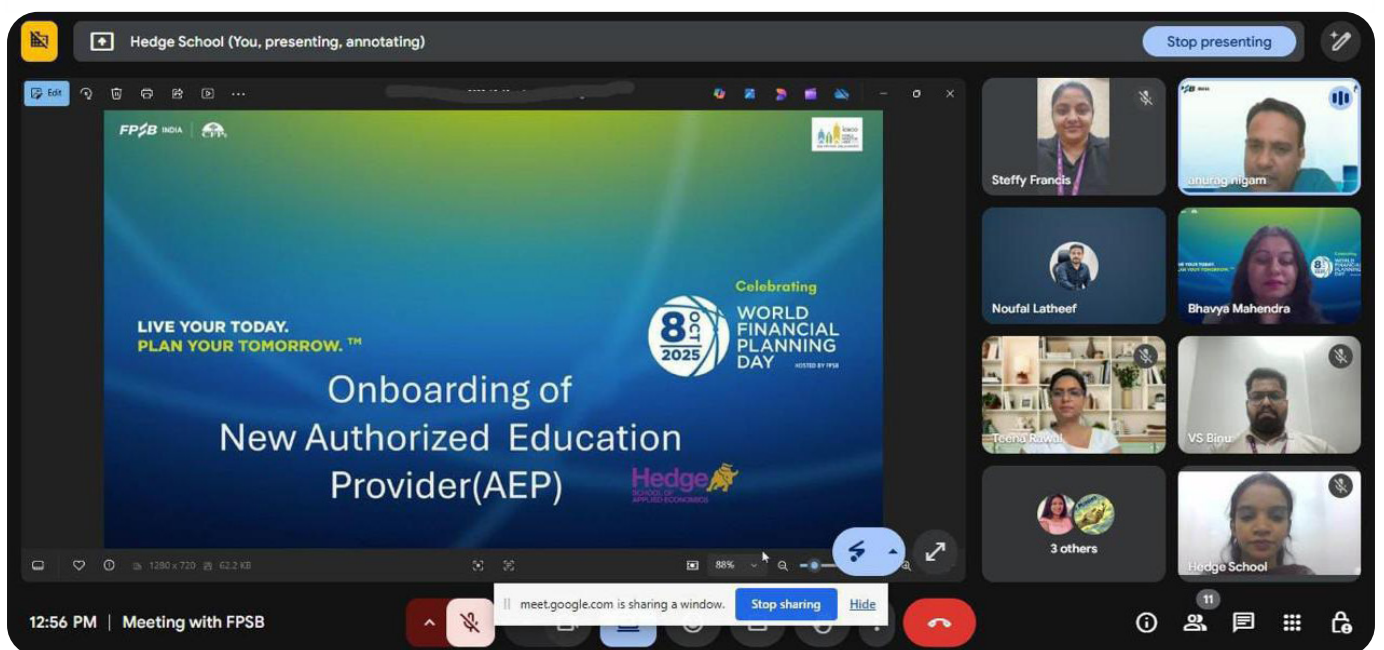
This marks the beginning of a promising partnership dedicated to fostering professional growth and promoting financial well-being.



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FPSB India Onboards Hedge School of Applied Economics as a New Authorised Education Provider in Financial Planning Education



FPSB India proudly welcomes Hedge School of Applied Economics as a new Authorized Education Provider (AEP), further expanding our growing network of quality education partners across India. This collaboration reinforces FPSB India's commitment to advancing professional standards and promoting excellence in financial planning education.

Through this partnership, aspiring financial professionals will gain access to structured learning pathways and resources that align with global CFP® certification standards.

FPSB India Partners with SIMSREE for the Grand Symposium 2025

FPSB India was honoured to be the Knowledge Partner for the Symposium 2025 hosted by the Sydenham Institute of Management Studies, Research and Entrepreneurship Education (SIMSREE), a premier event where finance meets innovation and business drives impact. Chandrakant Sureka delivered an inspiring address on the importance of financial education and making financial planning a national priority.

During the symposium, the MSc Finance program at SIMSREE was digitally re-inaugurated, marking a milestone moment in financial education. The ceremony was graced by distinguished academicians including Dr. Shriniwas Dhure, Director, SIMSREE, and Dr. Sangeeta Pandit, Head – Finance Department, whose leadership and vision have been instrumental in advancing the program's success.

Representing FPSB India were Chandrakant Sureka, CEO, Teena Rawal, Sharath Nambiar, Sajju Joy, Trupti Patil and Prashant Dhuri.

Hon'ble dignitaries Shri Chandrakant Patil, Minister for Higher and Technical Education, Shri Devendra Fadnavis, Deputy Chief Minister, and Shri Eknath Shinde, Chief Minister of Maharashtra, extended their best wishes to SIMSREE and FPSB India for this impactful initiative.



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HIGHLIGHTS

FOR THE MONTH!

Celebrating World Financial Planning Day 2025 — A Nationwide Movement of Financial Empowerment

In collaboration with IOSCO and FPSB Ltd., FPSB India proudly joined the global celebration of the ninth annual World Financial Planning Day (WFPD) this October — an initiative that unites over 230,000 CFP® professionals worldwide to champion financial literacy, education, and investor protection as part of IOSCO's World Investor Week (6–12 October 2025).

This year, FPSB India transformed WFPD into a nationwide movement of awareness, education, and empowerment. From finance lab inaugurations, MoU signings, and corporate partner onboardings to seminars, batch launches, and student-led engagements, the celebrations echoed one powerful message — financial planning is for everyone.

With 60+ impactful activities, 7,000+ participants across institutions, corporates, and communities, and the active involvement of CFP® professionals, educators, and industry leaders, FPSB India reaffirmed its commitment to nurturing financially confident individuals and competent, client-centric professionals. This momentum was further strengthened through a high-impact 15-day digital campaign across social media channels, featuring vox-pop videos, first ever comic series, trending formats, and creative storytelling that reached over 270K viewers. The outreach was amplified by 15+ media features across leading platforms including CNBC-TV18, Moneycontrol, Cafe Mutual, ANI, Business Standard, The Print, Latestly, and regional outlets such as Lokmat Times, Dailyhunt, and Loktej, ensuring WFPD's message resonated nationwide.

QUICK RECAP

BSE India & FPSB India Bell Ringing Ceremony

FPSB India marked World Financial Planning Day 2025 with a symbolic Bell Ringing Ceremony at BSE India, proudly joining the global "Ring the Bell for Financial Literacy 2025" campaign. This event marked our sixth consecutive annual celebration, aligning with exchanges worldwide to promote investor protection and financial literacy — reinforcing a shared vision of fostering a financially aware and resilient society.

The ceremony featured inspiring addresses by Ms. Kamala Kantharaj, Chief Regulatory Officer, BSE India; Chandrakant Sureka, CEO, FPSB India; and Renu Maheshwari, Chairperson, ARIA, who graced the occasion as the Guest of Honour.

Hosted by Saniya Chawan, Manager – Certifications & Engagements, FPSB India, the ceremony concluded with closing remarks by Teena Rawal, Head of Business Development.



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IIM Ahmedabad – Executive Program Batch Commences



FPSB India proudly launched the Executive Program in Financial Planning & Investment Advisory in collaboration with IIM Ahmedabad. The first batch began their campus immersion on 29 September 2025, marking a milestone in advancing professional financial education.

NMIMS Bengaluru – Masterclass & Quiz

FPSB India conducted a CFP® Masterclass and Financial Planning Quiz at NMIMS Bengaluru to celebrate World Financial Planning Day 2025. Over 200 students actively participated as Teena Rawal, Head of Business Development, delivered an inspiring session on the dynamic world of financial planning.



SP Jain Global – Batch Launch & WFPD Celebration

The Batch Launch at SP Jain Global doubled as a celebration of World Financial Planning Day 2025, with sessions led by Chandrakant Sureka, CEO, FPSB India; Teena Rawal, Head of Business Development; and Anshul Srivastava, Head of Standards & Examinations. The sessions highlighted India’s evolving financial landscape and the value of the CFP® certification. The event concluded with insights on the student journey through FPSB India’s LMS portal.



Fintellect Intelligent Financial Services – Rural Financial Planning Conference

Fintellect Intelligent Financial Services organized a thought-provoking conference titled “Perspective on Rural Financial Planning in India: Opportunities and Challenges” on 8 October 2025 at Galaxy Pavilion, Mirzapur.

The event fostered meaningful discussions on advancing financial literacy in rural India. Shiv Raj Singh, CFP®, shared powerful insights on rural financial planning opportunities, while Anurag Nigam, National Manager – Business Development, FPSB India, emphasized that financial planning is for everyone. The event saw enthusiastic participation from 100+ delegates, including CFP® professionals, AMCs, and industry experts, and concluded with the felicitation of rural financial leaders driving impact across India’s heartland.



Christ University – Vicharmanthan 2025



As part of the World Financial Planning Day 2025 celebrations, Christ University, Delhi NCR, in collaboration with FPSB India, hosted its flagship event “Vicharmanthan.”

The event brought together 200+ students from Christ University and other leading institutions for an engaging day of case studies, group discussions, and financial planning quiz competitions, all centered on promoting financial literacy and awareness.



Teena Rawal, Head of Business Development, FPSB India, delivered the dignitary address, setting the tone for an insightful and inspiring event. The competitions were evaluated by Rajesh Singh, Regional Manager- Business Development, Lushika Sahu, Senior Manager – Partner Success & Business Strategy, and Priya Dhawan, Dep. Manager-Operations, FPSB India, who served as members of the jury panel.

FPA Edutech Pvt. Ltd. – WFPD College Outreach

FPA Edutech actively conducted 30+ sessions across colleges and universities as part of WFPD 2025 celebrations, spreading awareness about financial planning and the value of the CFP® certification.



Edufinpact Labs Pvt. Ltd. – Yoga for Financial Well-Being

FPSB India visited Edufinpact Labs Pvt. Ltd. as part of WFPD celebrations, hosting a rejuvenating yoga session, donation drive, and student interactions promoting financial literacy and well-being. Representatives from FPSB India – Chandrakant Sureka, CEO, FPSB India; Sajju Joy, Sr. Manager – Certifications; and Prashant Dhuri, Sr. Manager – Operations – shared valuable insights on pursuing the CFP® certification.



College of Financial Planners (COFP) Themed WFPD Event



COFP celebrated World Financial Planning Day with a corporate-themed event featuring addresses by Chandrakant Sureka, Teena Rawal, and attended by Hemambika Hariharan, Deputy Manager – Standards & Examinations, FPSB India. The venue reflected the WFPD spirit with thematic décor and discussions reinforcing financial awareness.

Beyond Learning Finance – Be a Financial Advisor for a Day

Beyond Learning Finance hosted an interactive activity titled “Be a Financial Advisor for a Day,” where students worked in teams on client profiles and planning exercises, concluding with fun games, wrap-ups, and reflections.

This engagement session was attended by Rutika Patil, Manager – Certifications; Trupti Patil, Manager – Operations; Prashant Dhuri, Sr. Manager – Operations; and Samikshya P, Management Trainee, from FPSB India.



House of Financial Planners – Celebrating Collaboration

At the House of Financial Planners, Ahmedabad, FPSB India celebrated WFPD 2025 with a cake-cutting ceremony and discussions on strengthening collaboration to spread CFP® awareness among the next generation of professionals.



Indian Institute for Financial Certifications (IIFC) – Interactive Student Webinar

FPSB India partnered with IIFC for a lively WFPD webinar, where Teena Rawal, Head of Business Development and Rajesh Singh, Regional Manager-Business Development from the FPSB India Team, along with Harminder Garg, Founder & Chief Mentor, IIFC, guided 25+ participants through the principles of financial planning and the benefits of pursuing CFP® certification. The session saw strong engagement and curiosity among aspiring professionals.



International College of Financial Planning (ICOFP) – Podcast & Student Session



FPSB India joined ICOFP for a special WFPD podcast featuring Teena Rawal, Head of Business Development, FPSB India, and Rishi Narang, Academic Head, ICOFP, discussing the growing need for financial planners.

Additionally, Anshul Srivastava, Head of Standards & Examinations, conducted an engaging in-person session for students, emphasizing the importance of financial planning and professional certification.

MyLogic Business Management School – Webinar & Quiz

MyLogic Business Management School, Bengaluru, hosted an engaging webinar titled “Finance in Focus: Trends and Insights from Industry Experts,” followed by a lively financial planning quiz.

In celebration of World Financial Planning Day, MyLogic also organized an on-campus financial planning quiz, where Chandrakant Sureka and Teena Rawal felicitated the winners. The event perfectly captured the spirit of WFPD, combining learning with enthusiasm and inspiring students to explore emerging opportunities and trends shaping India’s financial advisory landscape.



Sahrdaya College of Advanced Studies – Engaging the Community



In celebration of WFPD and Investor Week, Sahrdaya College of Advanced Studies, Thrissur, hosted multiple awareness and creative engagement activities. Jackson David C, CFP®, and Bhavya Mahendra, Manager – Business Development, led impactful sessions attended by 150+ students, promoting financial literacy and professional growth.

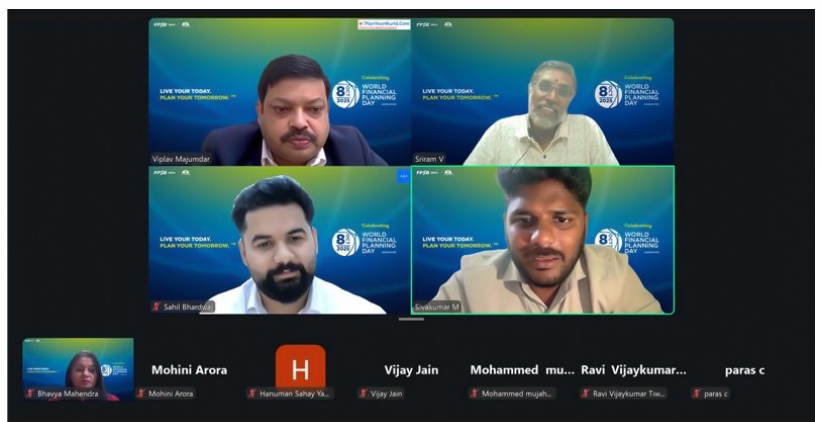


Unique Global Education – Awareness Sessions

Unique Global Education organized online and offline sessions on 8 October to enhance student awareness about financial planning and the opportunities available through FPSB India's certification pathway.

Plan Your World Training Academy – Opportunities Webinar

FPSB India partnered with Plan Your World to deliver a webinar on “Opportunities with CFP® Certification.” The session, featuring FPSB India Team Members – Bhavya Mahendra, Sriram Vaidyanathan, Manager – Operations, and Sivakumar M, Manager – Creatives, along with Viplav Majumdar, Founder, Plan Your World Training Academy, covered career potential, exam insights, and eligibility, concluding with appreciation for AEP partners and their consistent support.



WATCH WFPD HIGHLIGHTS



Social Media Campaign Highlights

As part of our ongoing mission to enhance financial planning awareness across India, FPSB India launched a series of engaging and educational social media campaigns for World Financial Planning Day (WFPD) 2025. This year, we focused on storytelling, relatable scenarios, and the transformative impact of professional financial guidance.

We invite you to go ahead and engage with these campaigns and feel free to like, share, repost, and amplify them through your own networks.

Campaign 1: Celebrating World Financial Planning Day 2025



Our first campaign spotlighted the global significance of WFPD, an initiative led by IOSCO and supported by FPSB since its inception in 2017. As we mark the 9th year of celebration, FPSB India proudly joins over 230,000+ CFP® professionals worldwide to champion the importance of financial planning, investor protection, and long-term financial well-being.

Core Message: Join us in celebrating WFPD 2025 and take charge of your financial journey.

[VIEW HERE](#)

Campaign 2: Meet Raj – FPSB India’s First-Ever Comic Series



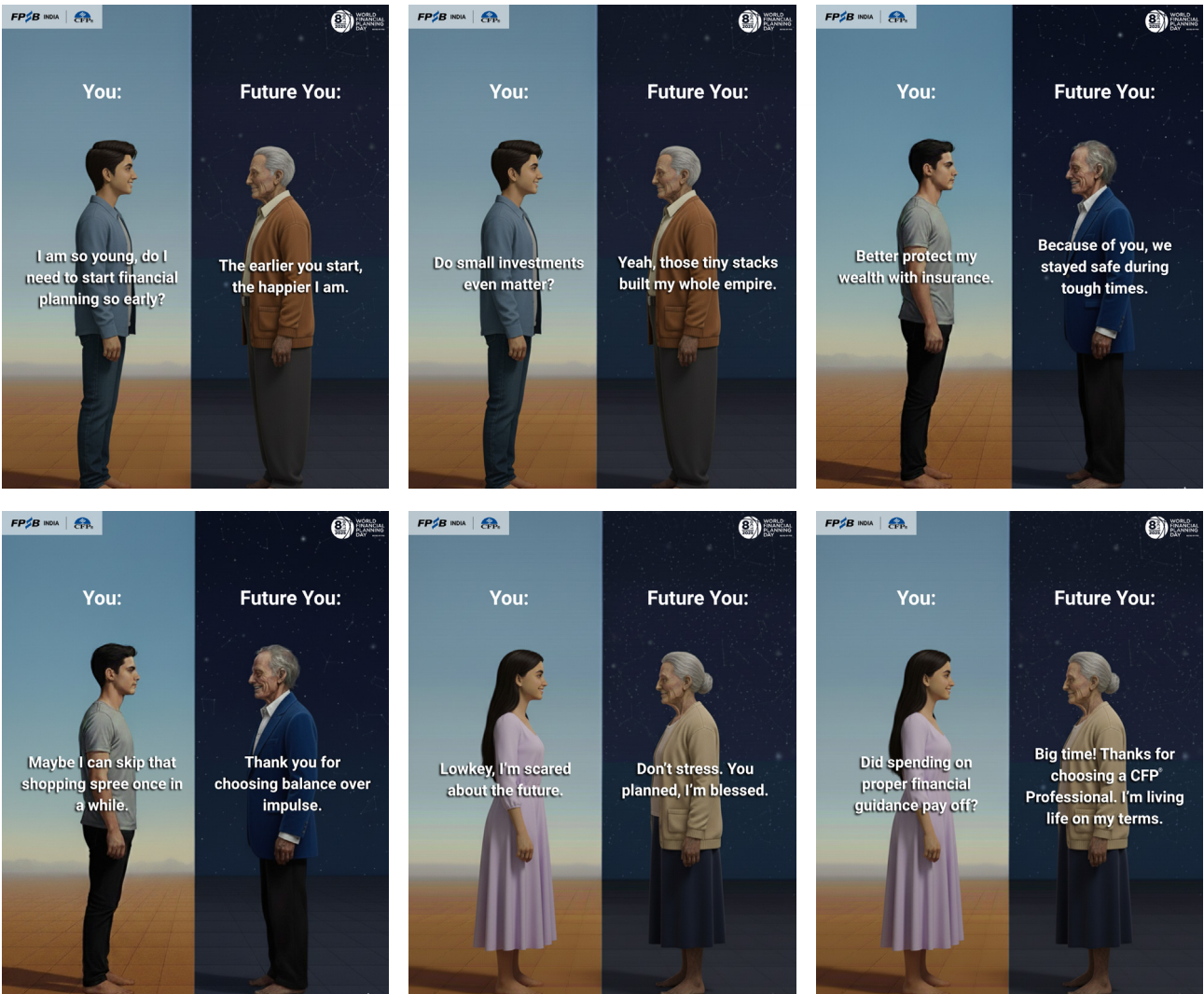
In a pioneering move, FPSB India introduced Raj, the central character of our first comic series. Raj’s journey, from falling prey to online “quick-money” trends to finding clarity through a CFP® professional - highlights the need for structured, credible financial planning.

This campaign simplifies real-life financial challenges through storytelling, making it easier for young audiences to relate and engage.

Core Message: When it comes to your money, trust a CFP® professional, not the algorithm.

[VIEW HERE](#) →

Campaign 3: A Conversation With Your Future You



Our third campaign invited individuals to visualize a meaningful dialogue with their Future Self, the one that reflects the consequences of today’s financial choices. The message encouraged audiences to start early, protect wisely, and maintain balance in their financial lives.

Core Message: Make your Future You proud. Consult a CFP® professional today.

[VIEW HERE](#) →

Journal of Financial Planning in India

September 2025 Edition Released

FPSB India is pleased to announce the release of the September 2025 Edition of the Journal of Financial Planning in India. This edition brings together thought-provoking articles and expert perspectives from CFP® professionals and industry leaders across India and the global FPSB network.

CFP® professionals can earn four (4) CPD credits by completing the quiz included in the journal, accessible through the MyFPSBLearning portal. Upon successful completion, credits will be automatically added to their online CPD account.

We invite our readers to share their feedback and suggestions for future editions as we continue to provide valuable learning and professional growth opportunities.



READ NOW



Missed the Webinar on “Smarter Retirement Planning Made Easy”





Webinar Alert!

Smarter Retirement Planning Made Easy

Know all about the Advanced NPS Calculator

Date: 17th October, Friday | Time: 5 pm to 6 pm IST



Suparna Tandon
Chief Executive Officer, National Pension System Trust (NPS Trust)



Amisha Sethi
Senior Vice President, Policy and Communication, FPSB India

FPSB India recently hosted an insightful and exclusive webinar on “Smarter Retirement Planning Made Easy”, featuring the Advanced NPS Calculator, a powerful tool designed to simplify and optimize retirement planning.

The session was headlined by Suparna Tandon, CEO, NPS Trust, who shared valuable insights on key developments and emerging opportunities at the NPS Trust. Anand Kumar, Deputy General Manager – Investment, Research, and Risk,

NPS Trust, demonstrated the capabilities of the Next-Generation NPS Calculator, showcasing how it can empower financial professionals and investors to make more informed retirement decisions. The engaging session was moderated by Ms. Amisha Sethi, Senior Vice President – Policy and Communication, FPSB India, and received an enthusiastic response from attendees keen to enhance their expertise in retirement planning.

WATCH THE FULL WEBINAR ON OUR YOUTUBE CHANNEL



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Guarding the Integrity of the CFP® Mark

At FPSB India, maintaining the integrity and reputation of the CERTIFIED FINANCIAL PLANNER® mark is of utmost importance to us. We take this opportunity to remind all our members and stakeholders about the significance of upholding the ethical use of the CFP mark.

Misusing or misrepresenting the CFP mark not only undermines its value but also reflects poorly on the entire financial planning community.

We urge all CFP® professionals to diligently follow the guidelines provided by FPSB India when using the CFP

mark in any communication or promotional material. Let us work collectively to preserve the credibility of the CFP mark and continue to elevate the standards of financial planning in India.



KNOW MORE



TESTIMONIALS



Nutan Kashyap, CFP®

Tedx Speaker | Author



“Becoming a CFP® professional has been a turning point in my career. Earlier, I used to offer financial suggestions to friends and family purely out of passion for helping others. The CFP® certification brought the much-needed credibility and transformed that passion into a recognized profession.

In a field traditionally dominated by men, it feels truly empowering when even the male members of my family now seek financial suggestions from me. This qualification has not only enhanced my technical expertise but also enabled me to build a strong personal brand and create an additional source of income.



Maninder Pal Singh, CFP®

Self-employed | Independent Financial Advisor | Banking Trainer



Earning the CFP® Certification has been one of the most meaningful milestones in my professional journey. The program not only deepened my technical knowledge of financial planning, but also helped me develop a more structured, client-centric approach in my work.

The rigorous learning process challenged me to think differently, refine my analytical skills, and stay committed to the highest standards of ethics and professionalism. As a result, I now feel more confident in delivering comprehensive financial solutions and guiding clients through important life decisions with greater clarity and trust.

The certification has also opened new opportunities for career growth, strengthened my credibility, and given me a stronger sense of purpose in the financial planning profession. I’m grateful for the transformation it has brought to my expertise and the value I can now create for the people I serve.

SOCIAL MEDIAL HANDLES

