



## CFP® Professionals CONNECT



**NEWSLETTER**

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**EDITION**

### MESSAGE FROM THE CEO

Dear CFP® Professionals Family,

Warm greetings and best wishes for 2026!

As we begin the new year, I would like to extend my sincere appreciation to our CFP® professionals, education partners, institutional collaborators, and stakeholders for their continued trust and engagement. It is heartening to note that the CFP® professional's community has been growing steadily and is on track to cross 3,530 professionals by the close of 2025. This reflects the continued confidence shown by our CFP® professionals in our vision and mission. FPSB India in turn remains committed to advancing professional standards and reinforcing the credibility of financial planning in India and will endeavour to fruitfully engage with the stakeholders to add value to the professional community.

Over recent months, FPSB India has made deliberate strides in strengthening the profession's foundation through structured education, institutional partnerships, and thought leadership. We have expanded accredited academic pathways through collaborations with leading institutions, including the latest launch of new university-based programmes in personal finance and wealth advisory. Our continued engagement with institutions such as IIM Bangalore and ATLAS SkillTech University represents a focused effort to integrate academic rigor with professional standards, thereby strengthening the long-term talent pipeline for the financial services industry and the Financial Planning profession.

Alongside academic initiatives, FPSB India has continued to deepen its engagement with industry bodies, regulators, and global forums. Participation in national and international summits has enabled us to contribute meaningfully to discussions on future skills, ethical practice, investor trust, and the evolving role of financial planners in a technology-driven environment. We participated in Student Programme of some IIMs in the country and it was heartening to note the enthusiasm & intelligence of young minds. I would like to mention our continued outreach to students and early-career professionals through Authorised Education Providers, ensuring awareness and access to the CFP® certification as a benchmark of professional competence.

This edition of the newsletter captures select highlights from the initiatives and reflects the strategic direction in which the profession is evolving steadily. Each engagement underscores our commitment to quality, relevance, and sustainability, the principles that remain central to FPSB India's mandate. Do watch out for our exciting Webinars and activities in the coming months.



As we look ahead in 2026, our priorities remain clear: strengthening professional and ethical standards, enabling high-quality education and assessment, and fostering collaboration across the CFP® professionals' community, academia, industry, and policymakers. Our activity levels will definitely be stepped up in the coming year. The FPSB India team and I remain focused on executing these priorities with discipline, transparency, and a long-term perspective, while supporting CFP® professionals in delivering trusted, client-centric advice.

On behalf of the FPSB India team, I wish you and your families a year of good health, purposeful progress, and continued professional success.

Warm regards,

**Chandrakant Sureka**

*Chief Executive Officer, FPSB India*

# LATEST

## UPDATES & DEVELOPMENTS

### Another Milestone in Professional Financial Education: PFWA Launched at IIM Bangalore in collaboration with FPSB India



IIM Bangalore launched its first-of-its-kind Certificate Programme in Personal Finance and Wealth Advisory (PFWA), developed by the Centre for Capital Markets and Risk Management in collaboration with FPSB India. The launch, which received wide media coverage, marked a key milestone with FPSB India formally accrediting the programme to strengthen professional standards in personal finance and wealth advisory education.

Dr. Aishwarya Krishna, Research Consultant, CCMRM, highlighted the programme's practice-oriented and data-driven structure, while Teena Rawal, Head of Business Development, FPSB India, outlined FPSB India's long-term engagement plan with IIM Bangalore. The FPSB India team namely Chandrakant Sureka CEO, Teena Rawal, and Rajesh Singh, Regional Manager-Business Development played a key role in designing and supporting the programme, ensuring it meets professional and industry standards.

Discover how IIM Bangalore's 'Certificate Programme on Personal Finance & Wealth Advisory (PFWA)' can take your professional growth to the next level.

[CLICK HERE](#) →

Applications are now open!  
Last date to Apply is 23rd  
Feb 2026.

### Strengthening Partnerships: FPSB India Presents Award to IIBF

FPSB India Team recently visited the Indian Institute of Banking & Finance (IIBF) to present the Best Strategic Partner Award, announced at our Hyderabad event.

During the visit, the team met with Mr. Biswa Ketan Das CEO, IIBF and his colleagues to explore opportunities for collaborative events and webinars. The discussion focused on leveraging the partnership to create impactful initiatives that enhance engagement and knowledge sharing within the financial services ecosystem. This visit reinforces FPSB India's commitment to building strong, value-driven collaborations.





# FPSB India and CPAC Committee Kick Off 2026 with Collaborative Engagement

FPSB India and the CPAC Committee convened their first offline meeting of 2026 in Mumbai. The session brought together FPSB India Team – Chandrakant Sureka CEO, , Alok Kumar CFP® - Head of Certifications & Engagements, Amisha Sethi – Sr. VP Policy & Communications, Anshul Srivastava CFP® Head of Standards & Examinations, Teena Rawal- Head of Business Development and Saniya Chawan – Manager, Certifications & Engagements along with CPAC Committee members – Arun Thukral CFP®, Naresh Pachisia CFP®, B Srinivasan CFP®, Renu Maheshwari CFP®, Sanjeev Govilla CFP®, DV Suresh CFP®, and Kavita Devi CFP® – for an engaging and collaborative discussion.

The meeting marked a significant step in fostering stronger partnerships, aligning efforts, and exploring new initiatives to enhance the impact and growth of the CFP® profession in India throughout 2026.



# FPSB India Accredits ATLAS SkillTech University's MBA in Financial Planning and Applied Finance



FPSB India marked an important milestone at the official launch of ATLAS SkillTech University's newly accredited MBA in Financial Planning and Applied Finance programme. The accreditation certificate was formally presented during the ceremony by Chandrakant Sureka (CEO), Teena Rawal (Head of Business Development) and Sharath Nambiar (Management Trainee), FPSB India, reflecting a shared commitment to strengthening standards in financial planning education.

The launch was attended by ATLAS leadership including Siddharth Shahani, Co-Founder; Dr. Jyoti Mehndiratta Kappal, Director – Department of Management; Bineet Desai, HOD – Finance; Alok Baptist, Executive Director; and Dr. Mohit Sushil Kelkar, Director.

The programme continues to strengthen the talent pipeline for the financial planning industry, with discussions already underway on future student engagement initiatives and joint events.

[VIEW LINKEDIN POST](#)





# FinSummit 2025 at IIM Raipur Welcomes Chandrakant Sureka as Guest of Honour

Chandrakant Sureka, CEO, FPSB India, was invited as the Guest of Honour at FinSummit 2025, the flagship finance conclave organised by Finatix, the Finance Club of IIM Raipur. The summit, themed “Reimagining Capital Markets: The Investor, The Innovation, The Institution,” examined how technology, innovation, and evolving regulations are reshaping the financial ecosystem. The day-long event featured keynote addresses by Dr. C. K. G. Nair, Senior Advisor, Nobias Finance and former Director, NISM (Chief Guest), and Chandrakant Sureka as Guest of Honour.

Key sessions included a panel discussion on “The New Age Investor: Trends, Tech and Trust” and an in-depth discussion on “From Distress to Opportunity: How Investors Identify Value in Troubled Companies.” The conclave brought together economists, industry leaders, and finance professionals to share insights on AI in finance, fintech disruption, risk intelligence, sustainable investing, cybersecurity resilience, and digital banking.



VIEW LINKEDIN POST



# Bridging Academia and Industry at IFERD Global Summit 2025



FPSB India participated in the IFERD Global Summit 2025, themed “Innovate, Educate, and Sustain: Building the Future through Knowledge and Collaboration.” At the summit, Chandrakant Sureka, CEO, FPSB India, delivered the welcome address, underscoring the importance of collaboration between academia, industry, and society in building a financially educated and sustainable future.

During the panel discussion, Teena Rawal, Head of Business Development at FPSB India, highlighted the growing need for digital fluency, critical thinking, and adaptability as AI and automation reshape the future workforce. The discussions focused on bridging the academia–industry gap and ensuring equitable access to skill development.



CLICK HERE





## FPSB India Engages with GLS University Students on the CFP® Certification Journey



As part of FPSB India's ongoing academic engagement, the FPSB India team met Mr. Dhruv Bhrambhadd, Registrar, GLS University, and conducted an interactive session for MS Finance students enrolled in a programme integrated with the CFP® certification.

The session was led by Anshul Srivastava CFP®, Head – Standards & Examinations, along with Sharath Nambiar, Management Trainee, and focused on the value of pursuing the credential, exam structure, key expectations, and effective preparation strategies. The discussion was highly engaging and provided students from the first batch with clarity and motivation as they prepare to appear for their exams in February or March.

## Driving Awareness on CFP® Certification for Undergraduate Students with IMS Proschool



An interactive session on the CFP® certification program was recently conducted at Delhi Skill and Entrepreneurship University by IMS Proschool Pvt. Ltd., one of the Premium Education Providers of FPSB India, for Banking and Finance undergraduate students.

Representing FPSB India, Rajesh Singh, Regional Manager – Business Development, led the session and highlighted the growing importance of professional personal financial planning. The discussion focused on career pathways enabled by the CFP® certification and the critical skills required to excel in the wealth management and advisory space. The session reinforced FPSB India's commitment to expanding awareness and building future-ready talent through its education partners.



EXPLORE WHAT’S NEW ON THE FPSB INDIA JOB BOARD



FPSB India has recently added several exciting job postings to the Job Board on our website, opening doors to a wide range of career opportunities in financial planning. From entry-level roles for aspiring planners to senior positions for experienced professionals, there’s something for every stage of your career.

If you’re ready to take the next step or simply want to stay updated on the latest opportunities in the profession, we encourage you to visit the FPSB India Job Board and explore what’s on offer.

Your next career move could be just a click away! ➔

FPSB India Job Board ➔





# SOCIAL MEDIA

## CAMPAIGN HIGHLIGHTS

To kick off 2026, FPSB India launched a series of purpose-driven social media campaigns aimed at reinforcing the role of professional financial planning in everyday life. Each campaign connects common aspirations at the start of the year with the importance of informed, goal-based financial decisions guided by CFP® professionals.

### Campaign 1:

The first campaign taps into the energy of a new year, reminding audiences that while new routines and resolutions set the tone for 2026, a solid financial plan is what truly keeps them on track. It encourages individuals to begin the year with expert guidance from a CFP® professional.

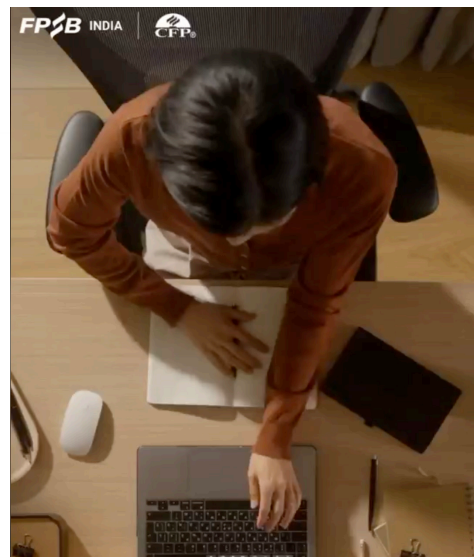
[VIEW LINKEDIN POST](#) →



### Campaign 2:

The second campaign positions financial planning as an essential part of a well-rounded 2026 to-do list—alongside well-being, skill-building, and life experiences—highlighting the importance of making informed financial decisions early.

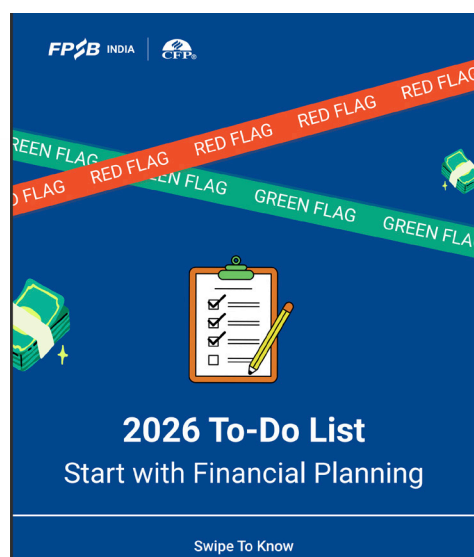
[VIEW LINKEDIN POST](#) →



### Campaign 3:

The third campaign focuses on mindset and habit-building, urging audiences to leave behind financial behaviours that slow progress and replace them with clarity, discipline, and professional guidance.

[VIEW LINKEDIN POST](#) →



# SPOTLIGHT NEWS!

## A Curated List of Media Articles for Financial Planning Professionals

The reach ratio: Why India Post's massive reach isn't enough to sell mutual funds

**mint** | **Markets**



From Property To Portfolios: The New Middle-Class Wealth Playbook

**Outlook**  
**MONEY**



December 2025 NPS changes: A big step forward, but read the fine print

**moneycontrol**



Why do your financial plans fail even when markets perform well?

**INDIA TODAY**



Retiring soon? These tax changes will directly effect your income and savings

**THE ECONOMIC TIMES**



Proposed TER rationalisation can unlock investment-led growth

**FINANCIAL EXPRESS**  
Read to Lead



Planning for a lifetime care: Smart estate strategies for parents of children with special needs

**THE ECONOMIC TIMES**



Survey warns majority of Indians lack adequate savings and planning for retirement years

**The Telegraph** *online*



Want A Dream Wedding In 2026? Here's How To Build Your Fund Before It's Too Late

**NEWS 18**





Why most early retirement plans fail: Expert breaks down the real problem

INDIA TODAY



Why your financial plan must change as your family grows

mint | Markets



Money Reset For 2026: Tick These Boxes For Financial Freedom

NEWS 18



## FPSB India in News

Stay updated on the latest stories featuring FPSB India and insights from the financial planning community making waves across to inspire conversations around financial planning:

IIM Bangalore Launches Certificate Programme In Personal Finance And Wealth Advisory



IIMB introduces certificate programme on personal finance & wealth advisory

THE Hans India English Daily



IIM Bangalore launches certificate programme in personal finance, wealth advisory for professionals

NEWS CAREERS 360



IIM Bangalore introduces certificate programme in personal finance and wealth advisory



From numbers to impact: Financial planning as a career of the future



Rising medical costs? Here's how people with disabilities can build a strong financial safety net

THE ECONOMIC TIMES





# Missed our recent Masterclass Webinar on “ Gold & Silver 2.0: Reassessing Their Role in Today’s Portfolio”





**GOLD & SILVER 2.0:**  
Reassessing Their Role in  
Today's Portfolio



Friday, 19 December at 4:00 PM



A Masterclass with  
**Anshul Srivastava CFP®**  
Head Standards and Examination,  
FPSB India

Register Now →

Addressing this timely theme, FPSB India recently hosted a focused masterclass on the smart and strategic allocation of gold and silver for both short-term and long-term financial planning.

The session was led by Anshul Srivastava CFP®, Head – Standards & Examinations at FPSB India. Drawing on his two decades of experience in finance

and financial education, Anshul shared practical perspectives that helped simplify complex concepts and offered valuable guidance for making informed allocation decisions.



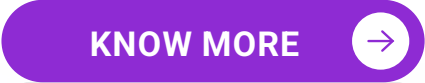
## Guarding the Integrity of the CFP® Mark

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.





# TESTIMONIALS



**Sanjeev Verma CFP®**

*CEO & Co-Founder | Transformative Wealth Mentors  
IMF Pvt. Ltd (Formerly TASPL)*



“Earning the CFP® certification has been a truly transformative milestone in my journey at Transformative Wealth Mentors IMF. My aspiration is to build a strong and professional wealth management practice rooted in the principles of sound financial planning and long-term wealth creation. I envision empowering clients with strategies that blend both security and growth, enabling them to enhance their wealth and achieve financial independence.

CFP® certification has equipped me with a globally recognised framework of financial planning that ensures my practice is professional, ethical and aligned with international best practices. The structured learning across all domains of financial planning has already enhanced my ability to analyse complex financial situations and create practical, client-focused solutions.

More importantly, the CFP® certification strengthens my credibility and trustworthiness in the eyes of clients. In an industry where trust is paramount, being a CFP® professional signals a commitment to fiduciary responsibility, transparency, and client-first practices. This will enable me to differentiate my services, attract more clients seeking comprehensive financial advice, and deliver value that extends beyond investment returns.

Finally, the CFP® certification is not just a milestone in my career—it is the foundation upon which I aim to build a sustainable, impactful and client-focused wealth management practice over the next five years and beyond.”



**Nimisha Kumar CFP®**

*Senior Director | Pentagraph – Your Investment Partners*



“After 21 enriching years in banking, I transitioned into my true calling as a financial advisor and Senior Director at Pentagraph, driven by a desire to help people achieve financial freedom. The CFP® Certification has played a pivotal role in shaping my thinking, approach and advisory model.

While my earlier career taught me how to do things, CFP® certification helped me understand the deeper why behind every

financial decision. It has strengthened my confidence and broadened my capability to advise clients holistically across personal finance, taxation, estate planning, insurance, risk management and behavioural biases.

Today, I conduct structured, goal-based discussions that empower clients to make informed choices aligned with their aspirations and risk appetite.”

## SOCIAL MEDIAL HANDLES

