

MESSAGE FROM THE CEO

Dear CFP® Professionals Family,

The past few months have been a truly energizing time for all of us at FPSB India. Across the industry, there is a visible shift in how financial planning is being perceived. It is encouraging to see the financial planning profession steadily gaining the attention and respect it deserves, and we are proud to be contributing to that momentum.

One of the most exciting developments has been the continued expansion of our academic collaborations. The launch of the Executive Program in Advanced Financial Planning & Digital Finance with IIM Ranchi is a significant step forward in bringing structured financial planning education into premier academic institutions. Alongside this, the growing interest in the Post Graduate Programme in Financial Planning with NISM reflects how strongly the next generation of professionals is responding to the need for deeper expertise in financial planning. These initiatives are about more than just new programs; they represent our commitment to building a strong pipeline of professionals who are equipped to serve clients with knowledge, integrity, and global standards.

Engaging directly with the broader financial ecosystem continues to be a key priority for us. Our recent participation in industry platforms such as FiDEX 2026 organised by Moneycontrol and the Outlook Money "40 After 40" event provided valuable opportunities to connect with financial distributors, advisors, students, and investors. Whether it was discussing retirement readiness, the role of professional advice, or the enthusiasm we witnessed from our CFP® professionals reaffirmed that financial planning is becoming increasingly central to the way people think about their financial futures.

I would also like to acknowledge the outstanding teamwork displayed during these engagements. The vibrant energy at our booths and the meaningful interactions with attendees were made possible by the dedication of the FPSB India team and the enthusiastic participation of our CFP® professionals.

As we continue this journey, what gives me the greatest sense of optimism is the community that surrounds this profession. From our CFP® professionals and academic partners to industry collaborators and aspiring planners, each of you plays an important role in shaping the future of financial planning in India.

Together, we will continue to move forward with purpose, strengthening the profession and ensuring that quality financial planning becomes accessible to more people across the country.

Best Regards,



Chandrakant Sureka
Chief Executive Officer, FPSB India

Latest Initiatives & Engagements

Another Milestone for Financial Planning Education: FPSB India Collaborates with IIM Ranchi

FPSB India, in collaboration with the Indian Institute of Management Ranchi (IIMR), has successfully launched the Executive Program in Advanced Financial Planning & Digital Finance, further strengthening its commitment to advancing financial planning education in India. The programme, developed over several months, marks another significant milestone in FPSB India's growing portfolio of high-impact academic partnerships.

The launch ceremony was held in the presence of senior leadership from IIM Ranchi, including Prof. Deepak Srivastava, Director; Prof. Amit Sachan, Dean – Executive Education; Prof. Raveesh Krishnankutty; and Prof. Manish Bansal. Representatives from FPSB India included Chandrakant Sureka, CEO; Teena Rawal, Head – Business Development; and Rajesh Singh, Regional Manager – Business Development.

This launch marks the 8th programme introduced by FPSB India this year, reinforcing its strategic focus on execution excellence and collaborations with leading institutions to advance professional financial planning education in the country.



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FPSB India Powers StřataGem Case Competition at K J Somaiya Institute of Management, Mumbai

The final round of the National Level Case Competition – StřataGem was recently held at the K J Somaiya Institute of Management, bringing together some of the brightest student minds from across the country. Powered by FPSB India, the competition received 130+ registrations, with the top six teams advancing to present their case solutions in the final round after multiple evaluation stages.

The presentations showcased impressive depth of research, analytical thinking, and innovative problem-solving approaches by the participating teams. Teena Rawal, Head – Business Development at FPSB India, served as one of the judges for the final round, evaluating the teams alongside the distinguished panel.

FPSB India was proud to support the initiative as the prize sponsor, reinforcing its commitment to nurturing the next generation of finance professionals. Congratulations to the winning teams of StřataGem 2026.



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Exploring Investor–Market Dynamics at the 6th Annual Research Conference by NISM



The 6th Annual Research Conference on Securities Markets, hosted by the National Institute of Securities Markets (NISM), brought together leading voices from academia, regulation, and the financial services industry to discuss the evolving dynamics of India's securities markets. The conference featured insightful addresses by Sashi Krishnan, Director, NISM; Tuhin Kanta Pandey, Chairman of the Securities and Exchange Board of India (SEBI); and N. R. Bhanumurthy, Director of the Madras School of Economics.



The discussions emphasized the importance of trust, transparency, and informed investor participation in strengthening market ecosystems. A panel discussion on technological progress for empowering innovators also explored how digital advancements are transforming markets and expanding access for participants.

The conference was attended by Chandrakant Sureka, CEO, and Teena Rawal, Head – Business Development, from FPSB India.

Future of Investing: Cross-Generational Insights from the GB2GB Summit

FPSB India participated as a Knowledge Partner at the GB2GB Women & GenZ Summit 2026 hosted by Empower Education, contributing to a thought-provoking panel discussion titled “Bridging Generations: She, GenZ and Industry Leaders Shaping Tomorrow’s Investors and MFDs.” The session explored how evolving generational perspectives, particularly those of women investors and Gen Z, are influencing the future of investing and financial advisory.



Representing FPSB India, Himani Sharma, Senior Manager – Brand Marketing, was part of the distinguished panel and offered valuable insights on how financial professionals can adapt to changing investor expectations in an increasingly digital and dynamic ecosystem. Her perspectives on engaging the next generation of investors and strengthening financial awareness contributed meaningfully to the discussion. The session underscored the importance of cross-generational collaboration in shaping a more inclusive, informed, and future-ready investment landscape.

Finance 360: Industry Leaders Discuss the Future of Financial Planning Careers at ATLAS SKILLTECH University



An Industry-Led Curriculum Review for the AMBA in Financial Planning and Applied Finance was recently held at ATLAS SKILLTECH University in association with FPA Edutech. The event featured a panel discussion titled “Finance 360: Personal Finance, Financial Planning & Wealth Management,” bringing together industry experts to discuss evolving trends in finance education and career opportunities.

Chandrakant Sureka, CEO of FPSB India, participated as an esteemed panelist alongside Ranju George (HRBP, SBI Mutual Fund), Ashish Pimple (Co-founder, CREED Capital), Ruchi Dhanjal (Lead – Talent Acquisition, HDFC Mutual Fund), and Manoj Chaudhary (CHRO, Edelweiss). The session, hosted by Bineet Desai and HOD – Finance at ATLAS SKILLTECH University. The panelists unanimously highlight the growing relevance of the CFP® certification and the increasing demand for qualified financial planning professionals in today’s financial ecosystem.

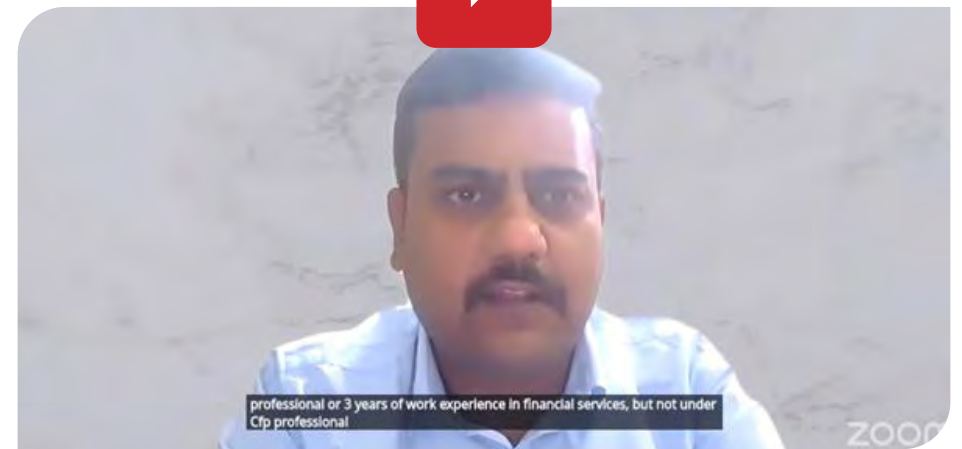


Inside the PGPFP Program: Key Insights from the Batch 2 Launch Webinar with NISM

FPSB India is pleased to announce the launch of the second batch of the Post Graduate Programme in Financial Planning (PGPFP) in collaboration with the National Institute of Securities Markets (NISM), reinforcing its commitment to developing future-ready financial planning professionals in India.

To mark the occasion, a Batch 2 launch webinar was hosted, bringing together aspiring finance professionals to learn more about the program and its career opportunities. Attended by 200+ participants, the session highlighted how the program integrates an industry-aligned curriculum with a pathway to the globally recognized CFP® certification, equipping participants for evolving roles across the BFSI sector.

The webinar featured insights from Meraj Inamdar, Assistant Professor at NISM; Dr. Shrishti Khare from NISM; Rajesh Krishnamoorthy, Adjunct Faculty at NISM; and Rajesh Singh, Regional Manager – Business Development



at FPSB India. Those who missed the session can watch the recording to learn more about the program and take the next step toward a future-ready career in financial planning.

Journal of Financial Planning in India

December 2025 Edition Released

FPSB India is pleased to announce the release of the December 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.



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Highlights Of The Month

FPSB India Promotes Retirement Readiness at Outlook Money's "40 After 40"

The 4th edition of the Outlook Money 40 After 40 was successfully held on February 20–21, 2026 at the Jio World Convention Centre in Mumbai, bringing together leading voices from government, policymaking, the BFSI sector, and experts across wellness, sports, and AgeTech to reimagine retirement as a phase of purpose, reinvention, and new beginnings. FPSB India was proud to be associated with this event as the Outreach Partner, contributing meaningfully to conversations around retirement readiness and long-term financial well-being.

At the Financial Wellness Zone, CFP® professionals engaged with attendees through interactive activities such as Financial Goal Analysis and personalized Financial Blueprints, encouraging participants to reflect on their long-term financial security. Chetan Reliawala, CFP®, also delivered an insightful session on the importance of a structured financial planning blueprint

for retirement, reinforcing the value of professional financial planning. CFP® professionals attending the event also had the opportunity to earn up to 5 CPD credits, along with receiving exclusive FPSB India merchandise, making the experience both enriching and rewarding.

FPSB India extends heartfelt appreciation to the CFP® professionals who generously contributed their time and expertise including Dileep Kulkarni CFP®, Pankaj Mathpal CFP®, Chetan Reliawala CFP®, Viresh Patel CFP®, Ronak Chevli CFP®, Nikhil Khemka CFP®, Jayant Vidwans CFP®, Durlabh Jatania CFP®, and Anjali Bairagra CFP®.

Special kudos also go to the dedicated FPSB India team working both on ground and behind the scenes whose efforts ensured a seamless and impactful experience for all attendees while reinforcing the message that it is never too late to take charge of one's financial future.



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FPSB India Showcases the Power of Financial Planning at FiDEX 2026 by Moneycontrol

The FiDEX 2026 (Financial Distributor Expo), hosted by Moneycontrol, was held on 6–7 March 2026 at NESCO Exhibition Centre, Mumbai, bringing together more than 6,000 financial distributors and over 100 exhibitors from across the financial services ecosystem. The event served as a dynamic platform to explore evolving regulations, emerging business models, and the future of client-centric advisory and distribution practices. FPSB India was proud to participate as the Exhibit Partner, spotlighting the value of holistic financial planning and professional excellence.

The FPSB India booth witnessed phenomenal engagement throughout the event, with professionals, students, and industry leaders coming together for meaningful conversations on the growing importance of financial planning and the value of the CFP® certification. Visitors had the opportunity to explore the evolving landscape of financial advice, receive exclusive FPSB India merchandise, and earn up to 5 CPD credits, making the experience both enriching and rewarding for attending professionals.

A key highlight of the event was the insightful panel discussion featuring Chandrakant Sureka, CEO of FPSB India and other eminent industry leaders on “Building Wealth with Confidence: Expanding India’s Investor Participation”, where conversations around expanding investor participation and strengthening confidence in wealth creation resonated strongly with the audience and sparked engaging dialogue across the community.

FPSB India is truly humbled by the phenomenal response and the large number of enquiries received at the booth, reflecting the growing interest in professional financial planning in India. CFP® professionals attending the event also had the opportunity to connect with the FPSB India team and fellow professionals, making the engagement both meaningful and memorable.

A special note of appreciation goes to the dedicated FPSB India team, both on-site and working remotely, whose contagious energy, coordination, and commitment made this initiative a resounding success. Their collective efforts continue to strengthen the mission of advancing the financial planning profession in India.



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Upcoming Webinar

27 March 2026 (Saturday) | 4:00 PM – 5:00 PM IST | Beyond Advice: Building and Managing a Successful Financial Planning Practice

Looking to strengthen and grow your financial planning practice? FPSB India invites CFP® Professionals to join an exciting and insightful webinar titled “Beyond Advice: Building and Managing a Successful Financial Planning Practice” - led by Sandeep Sahni, the Founder of Sahayak Gurukul and, an alumnus of IIM Lucknow with over 30 years of experience in financial markets and investing. Based in Chandigarh, he advises 500+ families globally and has mentored 300+ MFDs and financial professionals on setting up and growing successful advisory practices.

This session will bring practical insights and real-world experiences on how financial planning professionals can build, manage, and scale a thriving financial planning practice. Don't miss this opportunity to gain valuable perspectives on building a stronger and more impactful financial planning practice.

The banner features the FPSB India and CFP® logos at the top left. A central text box reads "AN EXCLUSIVE WEBINAR" above the title "Building and Managing a Successful Financial Planning Practice". To the right is a portrait of Sandeep Sahni, identified as "Sandeep Sahni, Founder, Sahayak Gurukul". At the bottom, a date and time section shows "DATE: 27TH MARCH, 2026" and "TIME: 04:00 PM TO 05:00 PM", with a "REGISTER NOW" button.

[Register Here](#) →

Missed our recent Masterclass Webinar on Decoding the Union Budget 2026

FPSB India recently hosted an engaging fireside chat titled “Decoding the Union Budget 2026,” aimed at helping financial professionals understand the practical implications of the latest budget announcements. The session featured Vivek Law, CFP® professional, Editor-in-Chief & Co-Founder of Simple Hai, in conversation with Amisha Sethi, Senior Vice President – Policy & Communications at FPSB India.

The discussion moved beyond headlines to explore what the budget means for financial planners, their clients, and households, offering insights into how professionals can interpret policy changes and adapt their planning strategies. If you missed the session, you can watch the full recording on our YouTube channel and revisit the key takeaways from the conversation.

The banner features the FPSB India and CFP® logos at the top. A central text box reads "INVITES YOU TO AN EXCLUSIVE FIRESIDE CHAT" above the title "DECODING THE UNION BUDGET 2026". Below the title is the tagline "Beyond Headlines. Beyond Soundbites." and a subtitle "An exclusive dialogue for Financial Planning Professionals. Strategic Insights. Policy Perspective. Implications for Financial Planning." At the bottom, there are portraits of Vivek Law (Editor in Chief and Co Founder, Simple Hai) and Amisha Sethi (Senior Vice President, Policy and Communication, FPSB India).

[Watch the full webinar on our YouTube channel](#) →

Social Media Campaign Highlights

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: If Money Could Talk



This campaign to encourage individuals to reflect on how purposeful financial planning can bring direction to their money and goals. The campaign highlighted that dreams, emergencies, and life goals require thoughtful planning, while emphasizing the role of CFP® professionals in guiding informed and goal-based financial decisions.

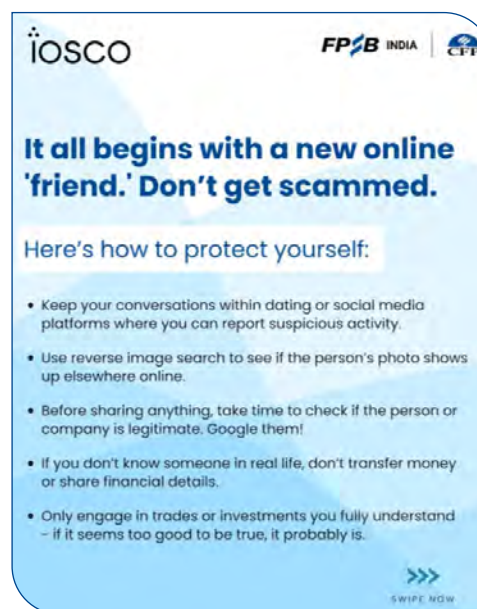
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Campaign 2: IOSCO's Campaign – Online Relationship Scams

This campaign highlighted how a structured financial plan can transform uncertainty into confidence and turn aspirations into actionable goals. It encouraged individuals to take charge of their finances through thoughtful, goal-based financial planning.

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Campaign 3: Beware of Relationship Investment Scams

FPB India joined the global investor awareness campaign led by the International Organization of Securities Commissions (IOSCO) this Valentine's Day to highlight the growing risk of online relationship investment scams. The campaign encouraged individuals to stay alert to too-good-to-be-true investment offers and emphasized the importance of awareness in protecting both their emotions and finances.

Campaign 4: I am this close to

This campaign highlighted how a structured financial plan can transform uncertainty into confidence and turn aspirations into actionable goals. It encouraged individuals to take charge of their finances through thoughtful, goal-based financial planning.



[YouTube Video](#) →



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Spotlight 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:

Special Women's Day Coverage: FPSB Featured in CNBC-TV18 on Women's Growing Role in Investing



FPSB India was recently featured in a story by CNBC-TV18 highlighting the expanding role of women in India's investment landscape. In the article, Dante De Gori, CFP®, Global CEO of Financial Planning Standards Board Ltd., emphasized the importance of thoughtful financial planning in helping women navigate life transitions and build long-term financial security.

The feature underscores the growing need for professional financial guidance and the role of financial planning in empowering women to take greater control of their financial futures.



How women are expanding their role in India's investment landscape

“ Financial planning remains key

Experts say financial planning and advisory support will be crucial in bridging this gap.

A Curated List of Media Articles for Financial Planning Professionals

Budget 2026 Reactions Live Updates: Money, Markets and the Industry Mood - By Siddhant Konduskar , Samreen Wani, Vasudha Mukherjee – Forbes India

Forbes^{INDIA}



Thrift And Thriver: The New Gen Z Flex – By Priyanka Debnath – Outlook Money

— Outlook —
MONEY



Union Budget 2026 expectations: What companies want from the government – By Times of India



Budget 2026 Income Tax Expectations Highlights: Health insurance relief, higher home loan deductions among key demands – By Economics Times Wealth

THE ECONOMIC TIMES



How women are expanding their role in India's investment landscape – By Anshul - CNBC TV18



FPSB India in News

IIM Ranchi, FPSB India launch executive programme in advanced financial planning and digital finance– By Careers 360

CAREERS360



एडवांस्ड फाइनेंशियल प्लानिंग प्रोग्राम लांच

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रांची, संवाददाता। भारतीय प्रबंधन संस्थान आईआईएम रांची और एफपीएसबी इंडिया ने संयुक्त रूप से एजीक्यूटिव प्रोग्राम इन एडवांस्ड फाइनेंशियल प्लानिंग एंड डिजिटल फाइनेंस की शुरुआत की है। यह प्रोग्राम विशेष रूप से उन कामकाजी पेशेवरों के लिए डिजाइन किया गया है, जो 'सर्टिफाइड फाइनेंशियल प्लानर' प्रमाणन के जरिए वेल्थ मैनेजमेंट के क्षेत्र में वैश्विक विशेषज्ञता हासिल करना चाहते हैं।

हाइब्रिड मॉडल पर आधारित पाठ्यक्रम में एआई आधारित वेल्थ प्लानिंग, फाइनेंशियल एनालिटिक्स, डिजिटल फाइनेंस रणनीति और पोर्टफोलियो इंजीनियरिंग जैसे आधुनिक विषयों का गहन प्रशिक्षण दिया जाएगा। संस्थान के निदेशक प्रो. दीपक कुमार श्रीवास्तव ने कहा कि यह पहल डिजिटल फाइनेंस और वैश्विक मानकों को जोड़कर भविष्य के वित्तीय विशेषज्ञ तैयार करेगी। वहीं, एफपीएसबी इंडिया के अंतरिम सीईओ चंद्रकांत सुरेका ने इसे भारत में वित्तीय नियोजन क्षेत्र को सशक्त बनाने में क्रांतिकारी कदम बताया।

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



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Testimonials

"The CFP® Certification served as the bridge that transformed my experience in the mutual fund industry into a structured career in financial education. While my industry background offered strong practical exposure, the CFP® program curriculum added critical depth in areas such as taxation, retirement, and estate planning, completing my professional skill set.

In my decade old career this credential marked a turning point, enabling me to transition from a relationship manager to a trainer with FPSB Authorised Education Providers. Training the next generation of financial professionals in association with FPSB India is both a responsibility and a privilege, grounded in the program's strong ethical framework. Today, the CFP® mark provides me the credibility required to deliver impactful and outcome-oriented learning."



Deepika Kafaltiya, CFP®

Trainer | NISM, The WallStreet School, Poornatha & VG Learning Destination

"Pursuing the Certified Financial Planner® (CFP) Certification program has been a meaningful step in my professional journey. It helped me deepen my understanding of financial planning beyond surface-level knowledge and appreciate how different aspects like investments, taxation, retirement, and risk management connect with each other.

The learning process challenged me to think more carefully and analytically about financial situations. More importantly, it strengthened my commitment to ethical and responsible financial planning while building greater confidence in my skills and professional growth."



Jimit A Shah, CFP®

CERTIFIED FINANCIAL PLANNER®

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