

### MESSAGE FROM THE CEO

Dear CFP® Professionals Family,

There are moments when you can clearly sense a profession coming into its own - and this is certainly one of them. The momentum we are witnessing today in financial planning is not just encouraging; it reflects a deeper shift in how advice is valued. With India now at 3,534 CFP® professionals, marking a 9.9% year on year growth, we are seeing steady, meaningful progress driven by trust, credibility, and a shared commitment to doing what is right for clients. At the same time, we are acutely aware that India has a potential which is far greater than where we have reached and there is a long way to go. It is our endeavour to boost this steady upward trajectory for the growth of the profession in India contributing to financial well-being of fellow countrymen.

This journey is becoming even more meaningful as the composition of our community evolves. Women now represent 23.6% of CFP® professionals in India, signalling not just numerical progress but a more inclusive and balanced future for the profession. Globally as well, the rise of younger professionals and increasing diversity reinforces the growing relevance and appeal of financial planning as a career.

Closer home, the past few months have brought with them some very significant developments. The recognition by the Pension Fund Regulatory and Development Authority (PFRDA) - enabling CFP® professionals to be engaged as Pension Agents is a strong validation of the credibility and competence that the certification represents. It opens new avenues for professionals to contribute meaningfully to retirement planning, an area that is becoming increasingly critical for individuals across the country.

At the same time, our collaboration with UpGrad marks an important step in expanding the reach and accessibility of financial planning education. This has

been complemented by the successful launch of the first batch of the programme at Indian Institute of Management Bangalore, as well as the onboarding of SKP Securities Ltd as an Approved Corporate Partner. Alongside these, our continued partnerships with academic institutions and industry stakeholders reflect a focused effort to strengthen talent pipelines and deepen the integration of financial planning into both education and practice.

What stands out across all these initiatives is a common thread the intent to strengthen not just participation in the profession, but the quality and impact of that participation. As financial planning continues to evolve, the need for well trained, ethical, and forward-thinking professionals will only grow stronger.

In this context, I would like to extend a warm invitation to you for the FPSB India Global Financial Planning Conclave 2026, scheduled for 30 May in Mumbai. This conclave is designed as more than just a gathering it is a platform to exchange ideas, learn from global best practices, and engage with perspectives that are shaping the future of our profession. We are particularly looking forward to hosting Dante De Gori, Global CEO of FPSB Ltd., along with other distinguished speakers who will bring valuable global insights to the discussions. Please keep a watch on our website and social media for the latest updates.

As always, I remain grateful for the continued support of our CFP® professionals, partners, and stakeholders. Your commitment is what drives this progress. Together, I am confident that we will continue to build a stronger, more credible, and future ready financial planning ecosystem in India.

Warm regards,  
**Chandrakant Sureka**  
CEO, FPSB India



# Highlights Of The Month

## India's CFP® Professionals Community Grows Stronger: 3,534 Professionals and Rising

FPSB India proudly highlights a steady and substantial increase in the financial planning profession in India, reflecting the strong and sustained growth of the CFP® professional community.

### Global Highlights:

- 236,300 CFP® professionals across 29 territories worldwide
- Net addition of 5,652 professionals in 2025
- 62.1% of new certificants are under 40, reflecting a young and dynamic workforce
- 37.9% of new certificants are women, showcasing global progress in diversity

### Key Highlights – India:

- 3,534 CFP® professionals as of 31st December 2025
- 9.9% year-on-year growth in CFP® professionals
- Women represent 23.6% of the CFP® professional's community, indicating growing diversity
- Rising demand for ethical, client-centric and structured financial advice



As Dante De Gori, CFP®,  
Global CEO, FPSB Ltd.,

“Growing demand for trusted, client-centric financial advice continues to drive the expansion of the CFP® professional community globally. India is an important part of this growth, with increasing awareness of financial planning and a clear shift toward seeking structured, professional advice.”

This achievement is a testament to the dedication of CFP® professionals and reinforces the increasing trust in financial planning as a critical pillar for long-term financial well-being.

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You're Invited to Our Next Event in Mumbai!  
FPSB India's Global Financial Planning Conclave 2026, Mumbai

**FPSB** INDIA



## FPSB INDIA GLOBAL FINANCIAL PLANNING CONCLAVE 2026

Refining Skills. Redefining Success for CFP® Professionals

**This Isn't a Conference. It's a Mindshift.**

**Date:** May 30<sup>th</sup>, 2026

**Venue:** Westin Garden City,  
Goregaon, Mumbai

FPSB India is excited to announce its next event in Mumbai – the FPSB India Global Financial Planning Conclave 2026, a distinctive platform designed to go beyond a traditional conference and advance the practice of financial planning in India, scheduled to be held on 30th May 2026 (Saturday) at The Westin Garden City, Goregaon East, Mumbai.

This landmark initiative will bring together global insights, cross-border perspectives, and rich learning experiences, reflecting the evolving needs of today's financial planning profession. The conclave will feature distinguished speakers, including Dante De Gori, CFP®, Global CEO of FPSB Ltd., along with other leading industry experts.

Participants will gain exposure to emerging trends, innovative practices, and global approaches shaping the future of financial planning, while exploring opportunities to strengthen and grow their professional practice.

CFP® professionals will earn 5 CPD credits, and all attendees will receive a Certificate of Participation.

Seats are limited - To reserve your spot, please register soon!

**Stay tuned** for Speaker and other event announcements by following our [Events Page](#) and [LinkedIn channel](#).

**REGISTER HERE**





## A Proud Beginning at IIM Bangalore: Launch of the 1st Batch on Personal Finance and Wealth Advisory Programme

We are pleased to announce the successful launch of the **first batch of the Certificate Programme on Personal Finance and Wealth Advisory at Indian Institute of Management Bangalore**, developed in collaboration with FPSB India. Nearly two years in the making, this initiative marks a significant step in strengthening professional education in financial planning.

The **inaugural cohort comprises 32 participants** from diverse professional backgrounds, reflecting the growing demand for structured learning and capability building in the financial advisory space. The programme was formally inaugurated by Prof. Jayadev Madugula Faculty at IIM Bangalore, Prof. Aishwarya Krishna Faculty at IIM Bangalore and Prof. Nitin Vishen Faculty at IIM Bangalore, along with Teena Rawal Head of Business Development at FPSB India and Rajesh Singh Regional Manager at FPSB India.

This milestone reflects a strong academic industry collaboration and sets the tone for building future ready financial planning professionals in India.



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## Strengthening the Ecosystem: SKP Securities Ltd Joins as Approved Corporate Partner



FPSB India has onboarded SKP Securities Ltd as an Approved Corporate Partner, formalised through a Memorandum of Understanding and facilitation of the ACP Certificate. This marks an important step in strengthening corporate participation in advancing the financial planning profession in India.

The MoU was signed by Naresh Pachisia Founder and Managing Director of SKP Securities Ltd and Chandrakant Sureka CEO of FPSB India, in the presence of Teena Rawal Head of Business Development at FPSB India and Rajesh Singh Regional Manager at FPSB India.

The collaboration will focus on employee upskilling through CFP® certification, creating career pathways, and strengthening corporate and industry academia linkages to build a more capable and future ready financial planning ecosystem in India.



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## FPSB India Partners with UpGrad to Strengthen Financial Planning Education in India



In a significant move to strengthen financial planning education in India, FPSB India has entered a strategic partnership with UpGrad through the signing of a Memorandum of Understanding. This collaboration aims to expand access to quality learning, enhance professional standards, and build greater awareness around financial planning as a career.

As part of this engagement, UpGrad has been onboarded as the marketing partner for FPSB India's premier institution integrated programmes, bringing its strong expertise in outreach and learner engagement to further scale these initiatives.

The MoU was signed in the presence of Teena Rawal Head of Business Development at FPSB India and Rajesh Singh Regional Manager at FPSB India, along with Anuj Vishwakarma Business Leader, Ankit Kumar Senior Manager and Sarajeet Kanungo Marketing Professional from UpGrad.

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## FPSB India Partners with First Bridge Business School for PGDM Programme

FPSB India has signed a Memorandum of Understanding with First Bridge Business School for its two-year full time PGDM programme, marking a significant step in strengthening structured financial planning education in India.

The MoU was signed by Teena Rawal Head of Business Development at FPSB India in the presence of Rajesh Singh Regional Manager at FPSB India, along with representatives from First Bridge Business School.

The institution, a new age business school based in Gurgaon and founded by experienced faculty and corporate professionals, brings a strong academic and industry-oriented approach to management education. This collaboration reflects a shared commitment to expanding access to quality learning.



## Empowering MFDs Through Financial Planning at ICAA Global Wealth Summit 2026



FPSB India was represented at the ICAA Global Wealth Summit 2026 in Kolkata, where Chandrakant Sureka CEO at FPSB India was invited as Chief Guest for the lamp lighting ceremony and speaker at the event hosted by ICAA.

In his address, he spoke on the importance of financial planning and highlighted how Mutual Fund Distributors can enhance their professional value by pursuing the CFP® certification. The session reinforced the growing relevance of structured financial planning in today's evolving wealth management landscape.



## FPSB India at ARIA Aspire 2026: Advancing the Future of Financial Advice

FPSB India was proud to be the Knowledge Partner at ARIA Aspire 2026, organised by the Association of Registered Investment Advisers (ARIA), supporting a platform focused on advancing unbiased financial advice for Viksit Bharat.

The event brought together industry leaders to deliberate on the future of financial advice in India and the importance of professional standards in building trust and credibility. A key highlight was the session on International Practice Standards by Paul Grimes, Chief Professional Officer at FPSB Ltd., who shared valuable global perspectives on strengthening advisory practices and about the CFP® Certification Program in India.

Chandrakant Sureka CEO of FPSB India represented the organisation during the lamp lighting ceremony, with Amisha Sethi Senior Vice President Policy and Communication at FPSB India, Anshul Srivastava CFP® Head of Standards & Examinations at FPSB India and Teena Rawal Head of Business Development at FPSB India also present at the event.



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## Celebrating Women Who Lead: Highlights from Women's Day Engagement with COFP

FPSB India was pleased to be part of the Women's Day celebration hosted in collaboration with the Council of Financial Planners (COFP), bringing together meaningful dialogue and shared perspectives.

Amisha Sethi Senior Vice President Policy and Communication at FPSB India delivered a compelling session on "The Power of the 6 Fs: The New Woman's Code," highlighting the evolving role of women as financially empowered, self-assured, and purpose driven individuals shaping their own paths.

The engagement reflects FPSB India's continued commitment to supporting platforms that recognise and celebrate the contributions of women across the financial planning profession.



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## Monergize'26: at NMIMS Bengaluru: Inspiring Financial Minds Through Experiential Learning

As part of Global Money Week 2026 celebrations, Monergize'26 organized by Vitta Vibhava at SVKM's Narsee Monjee Institute of Management Studies Bengaluru in collaboration with FPSB India brought together 200 plus participants for a dynamic week of learning, competitions and real-world financial simulations.

We are delighted to share that Teena Rawal, Head of Business Development at FPSB India felicitated the winners, celebrating their achievements and enthusiasm. The event was supported by esteemed leaders including Chandrakant Sureka CEO FPSB India, Dr Narayani Ramachandran Director NMIMS Bengaluru, Dr Shreya Chakraborty Assistant Professor NMIMS Bengaluru and Dr Dileep S Assistant Professor NMIMS Bengaluru.

## FPSB India at GB2GB Women and GenZ Wealth Summit 2026 by Empower Education

FPSB India participated in the GB2GB Women and GenZ Wealth Summit 2026 hosted by Empower Education, bringing together industry leaders to discuss the evolving landscape of financial planning.

Amisha Sethi Senior Vice President Communication and Policy at FPSB India was part of the panel "Coffee, Code and Compounding: Reimagining Wealth for Investors, MFDs and Clients," where she shared insights on the growing role of technology and compounding in reshaping wealth management.

With women now representing 23.6% of the CFP® professional community in India, such platforms play an important role in accelerating inclusion, amplifying women's leadership, and shaping a more balanced financial planning ecosystem.



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# Webinar

Missed our recent Webinar on Beyond Advice:  
Building and Managing a Successful Financial Planning Practice

**FP&B** INDIA



AN EXCLUSIVE WEBINAR

**Building and Managing  
a Successful Financial  
Planning Practice**

**Sandeep Sahni**

Founder, Sahayak Gurukul



DATE  
27<sup>TH</sup> MARCH, 2026

TIME  
04:00 PM TO 05:00 PM

**WATCH NOW**



FP&B India recently hosted a highly engaging webinar titled “Beyond Advice: Building and Managing a Successful Financial Planning Practice”, featuring Sandeep Sahni, Founder of Sahayak Gurukul. The session offered practical insights into building structured, sustainable, and scalable financial planning practices in today’s evolving advisory landscape.

Participants gained valuable perspectives on client acquisition and retention, practice management, and maintaining trust while scaling advisory services. Drawing from his extensive experience, the speaker shared real-world learnings on mentoring financial professionals and strengthening long-term client relationships.

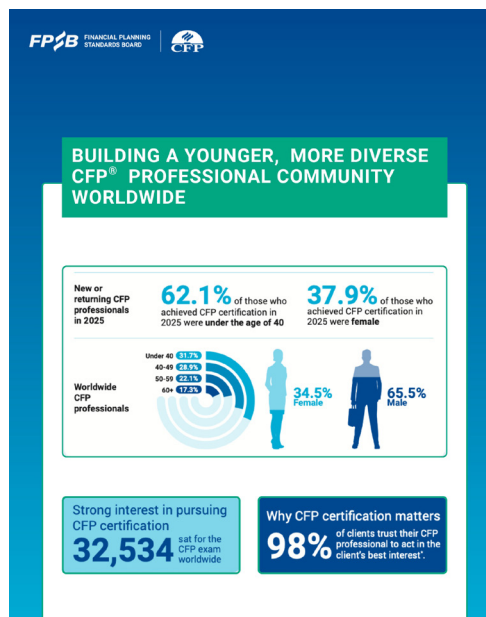
Watch the full webinar on our YouTube channel



# 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: Global Numbers



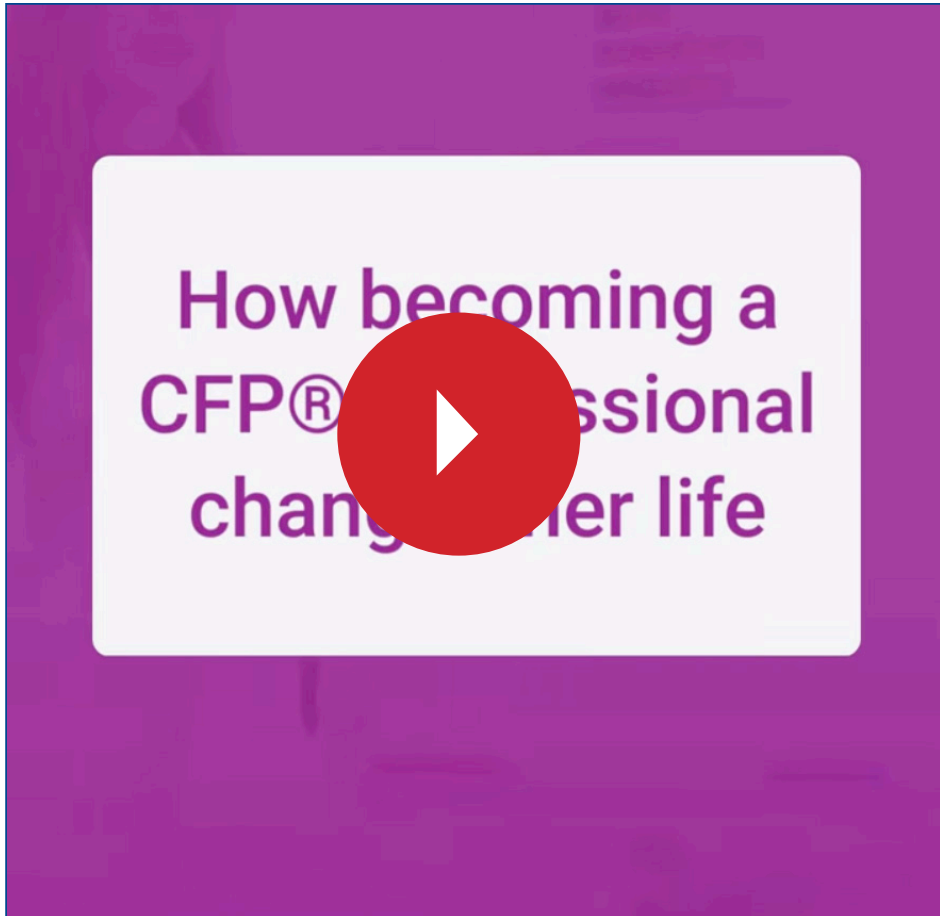
TO LEARN MORE ABOUT CFP® CERTIFICATION AND JOIN THE CFP® PROFESSIONAL COMMUNITY

Visit [www.fpsb.in](http://www.fpsb.in)

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## Campaign 2: Women's Day



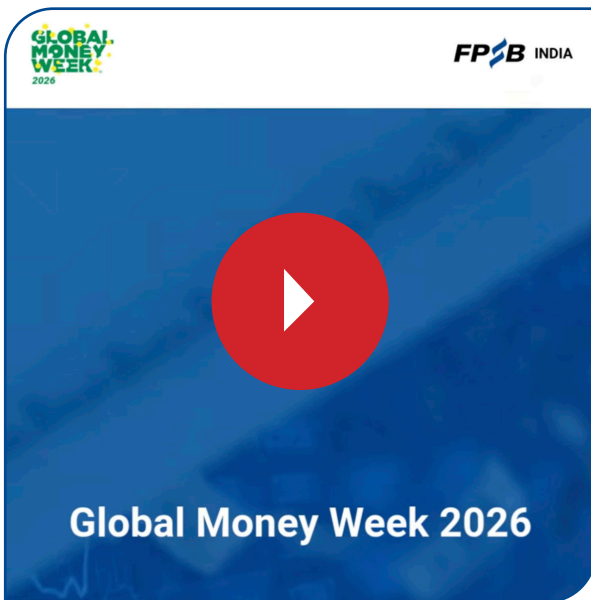
YouTube Video



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## Campaign 3: Global Money Week



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YouTube Video



# 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:

## FPSB India's Growth Story Covered Across Leading Publications:

India Sees Significant Rise in CFP® Professionals in 2025; Reflects Growing Demand for Professional Financial Advice

Outlook  
**MONEY**



cafemutual



dailyhunt



NP  
ATROLLING



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

Industry story

CNBC  
TV18



Building financial confidence early: A practical guide for GenZ and early professionals

moneycontrol



IIM Ranchi & FPSB India

THE NEW  
INDIAN EXPRESS



From advisors to life planners: The new age of finance careers

THE HINDU



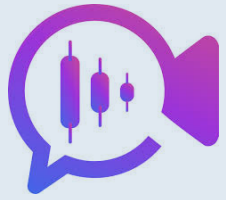
IIM Ranchi & FPSB India

NEWS by  
CAREERS 360





PFRDA allows CFP professionals to act as pension agents for NPS distribution



PFRDA Approves CFP Pros as NPS Agents to Boost Retirement Advice



PFRDA Recognises CFP® Professionals As Pension Agents



## 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



KNOW MORE



# Testimonials

"I have been in the financial services industry for almost 25 years, managing my business and professional practice like many others. However, after completing the CFP® program over the last four years, it has elevated my profession to a new level, aligned with global standards and always keeping the client's interests first. The CFP® program not only helps you master the art of investment but also enhances your knowledge, skills, and commitment to ethical practices in the profession. It enables you to understand your clients better, their needs and investment objectives, in order to help them achieve financial well-being and financial freedom.

As a CFP® practitioner, it has helped me build long-term relationships with my clients rather than purely transactional ones. It has contributed to the growth of my practice and enabled me to help my clients achieve their financial goals across different life stages without much difficulty or ambiguity. Subjects like Behavioral Finance play a major role in understanding investor psychology, especially during challenging market conditions. Finally, I would say that it is the gold standard program for those who want to build a career in financial planning and investments."



**Rabindranath Laha, CFP®**

*Founder | AR Wealth Solutions*

"The CFP® certification program has been a significant value addition to my professional journey. It has enhanced my expertise by enabling me to better understand client's needs and provide structured, goal-oriented financial guidance.

Being a CFP® professional allows me to act as a "Sherpa" in my client's financial journey, guiding them through complexities and helping them stay on the right path toward achieving their goals."



**Durlabh K Jatania CFP®**

*Financial Coach | Happyness Factory*

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FOR UPDATES, INSIGHTS, AND MORE.**

