

*Know The Speakers*

# FINANCIAL PLANNING CONCLAVE 2026

## Welcome Speech

**Chandrakant Sureka**  
CEO, FPSB India



## Keynote Speech

**Dante De Gori, CFP®**  
CFP®, Global CEO, FPSB Ltd



## Expert Session 1:

Growing Scope of Offshore  
Financial Practice -  
Opportunities for Indian CFP®  
Professionals in Australia



**David Sharpe, CFP®**  
Chair, Financial Advice  
Association Australia (FAAA)

## Panel Discussion 1:

The New Playbook – Asset Allocation in Turbulent Times



**Pankaj Mathpal, CFP®**  
MD & CEO, Optima Money



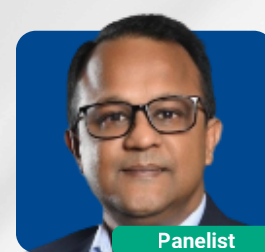
**Abhishek Tiwari**  
CEO, PGIM India AMC



**Sunil Singhania**  
Founder & CIO, Abakkus Asset  
Manager Pvt Ltd



**Jatinder Pal Singh**  
CEO, ITI AMC



**Rishi Nathany**  
MD & CEO, Multi Commodity Exchange  
Clearing Corporation Limited (MCXCCL)

**Expert Session 2:**  
The Irreplaceable CFP®  
Professional Powered  
by AI



**Suketu Sanghvi**  
Founder – Startup @ Zetheta |  
XL++ | Finarcadia | Nashvan

**Expert Session 3:**  
The Expanding Role of  
CFP® Professionals in  
GIFT CITY



**Pradeep  
Ramakrishnan**  
Executive Director,  
IFSCA GIFT City

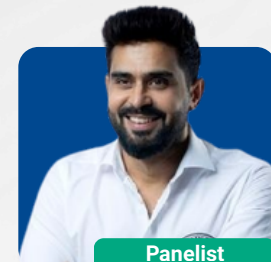
**Panel Discussion 2:**  
The Future of Wealth Advisory – Strategy, Scale & Sophistication



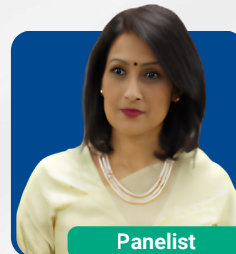
**Moderator**  
**Kalpesh S Dave**  
Executive Director at W by Groww



**Panelist**  
**Kirtan Shah, CFP®**  
Founder & CEO,  
Truvanta Wealth



**Panelist**  
**Feroze Azeez**  
Joint CEO, Anand Rathi  
Wealth Management



**Panelist**  
**Swati Kumari, CFP®**  
Founder, B Wealthy | Personal  
Finance Educator & Speaker



**Panelist**  
**Lovaii Navlakh, CFP®**  
MD & CEO, International  
Money Matters Pvt Ltd

**Expert Session 4:**  
Re-imagining the Family  
Office – Building Future-  
Ready Advisory Practices



**Rutul Shah**

Partner & Co-founder, Aurtus  
Consulting LLP

**Motivational Speech:**  
The Inner Game of Money



**Khurshed Batliwala**

Program Director & Senior  
Faculty, The Art of Living



**Dinesh Ghodke**

The Art of Living



May 30th , 2026



Westin Garden City,  
Goregaon, Mumbai

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