

MESSAGE FROM THE CEO

Dear CFP® Professionals Family,

As we begin the financial year 2026–2027, we do so with a strong sense of momentum, optimism, and purpose. It is encouraging to witness the growing recognition of financial planning as an essential pillar of financial well-being and the increasing commitment from institutions, industry leaders, and professionals toward advancing the profession in India.

One of the most encouraging and recent developments has been the expansion of our education and industry ecosystem through strategic partnerships with leading institutions and organizations. We were delighted to welcome Navkar Digital Institute, J.K. Shah Classes, and GLOBALFTI as Authorised Education Providers (AEPs), each bringing strong academic capabilities, national reach, and a shared commitment to quality education. In parallel, our partnership with PhillipCapital as an Approved Corporate Partner further reinforces the increasing recognition of financial planning within the broader financial services industry. Such collaborations reflect the growing importance of trusted, ethical, and client-centric financial advice in today's evolving economic environment.

Another highlight this season was IGNITE 2026 - our 'Train the Trainer' initiative that brought together faculty members and representatives from Authorised Education Providers across India in Mumbai. The enthusiasm, exchange of ideas, and collective commitment witnessed during the program reaffirmed our belief that the future of financial planning education in India is in capable hands.

As we look ahead, our excitement now builds toward the FPSB India Global Financial Planning Conclave 2026 in Mumbai. This landmark event has been thoughtfully curated to go beyond the format of a traditional conference and create a platform for meaningful dialogue, global

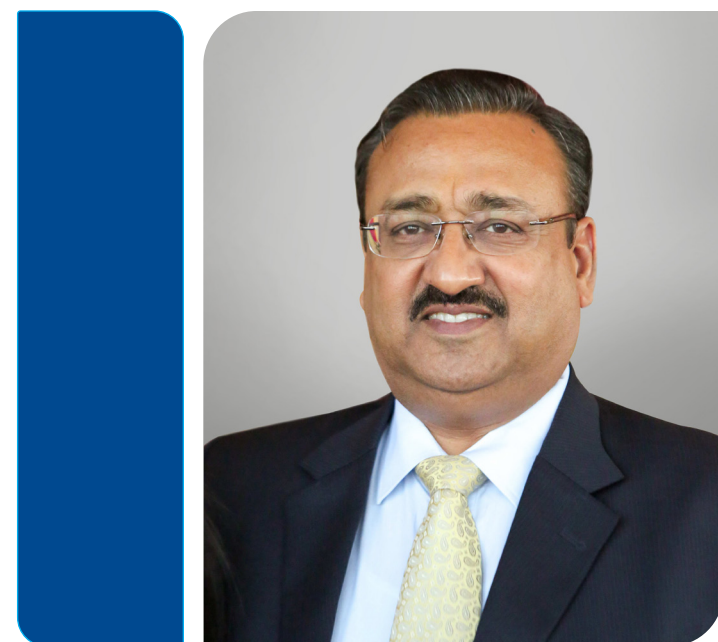
perspectives, and transformative learning experiences for the CFP® professional community.

Our team is working tirelessly behind the scenes to ensure that the conclave delivers exceptional value to every attendee: from insightful sessions and distinguished speakers to networking opportunities and future-focused discussions. We are committed to creating an experience that inspires, informs, and empowers the financial planning community in India.

I would like to sincerely thank all our CFP® professionals, education partners, corporate partners, faculty members, volunteers, and stakeholders for your continued trust, engagement, and contribution toward advancing the profession. Your support remains central to everything we do.

I look forward to meeting many of you in Mumbai and collectively shaping the next chapter of financial planning excellence in India.

Warm regards,



Chandrakant Sureka

Chief Executive Officer, (Interim) FPSB India

Highlights Of The Month

FPSB India Global Financial Planning Conclave 2026 – Agenda Unveiled!

FPSB India is delighted to unveil the much-awaited agenda for the upcoming FPSB India Global Financial Planning Conclave 2026, scheduled to be held on 30th May 2026 (Saturday) at The Westin Mumbai Garden City.

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. CFP® professionals attending the conclave will earn 5 CPD Credits, and all participants will receive a Certificate of Participation.

**REGISTRATIONS ARE
CLOSING SOON ON
25th MAY 2026**

Seats are filling fast – register at the earliest to secure your place at one of the most anticipated financial planning events of the year.



FPSB INDIA | **CFP®**

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 30th, 2026 Venue: Westin Garden City, Goregaon, Mumbai

TIMINGS	AGENDA
8:30 AM TO 9:30 AM	Registration + Networking
09:30 AM TO 09:40 AM	Welcome Address
09:40 AM TO 10:00 AM	Keynote Speech By Dante De Gori, CFP® Global CEO, FPSB Ltd
10:00 AM TO 10:30 AM	Address by Guest of Honour
10:30 AM to 11:00 AM	Expert Session 1: Growing Scope of Offshore Financial Practice - Opportunities for Indian CFP® Professionals in Australia
11:00 AM to 11:15 AM	Tea Break
11:15 AM to 12:15 PM	Panel Discussion 1: The New Playbook: Asset Allocation in Turbulent Times
12:15 PM to 01:00 PM	Expert Session 2 : The Irreplaceable CFP® Professional Powered by AI
01:00 PM to 02:00 PM	Networking Lunch
02:00 PM to 02:45 PM	Expert Session 3 : The Expanding Role of CFP® Professionals in GIFT CITY
02:45 PM to 03:30 PM	Panel Discussion 2 : The Future of Wealth Advisory: Strategy, Scale & Sophistication
03:30 PM to 04:30 PM	Expert Session 4 : Re-imagining the Family Office - Building future ready advisory practices
04:30 PM to 04:45 PM	Tea Break
04:45 PM to 05:30 PM	Motivational Speech : The Inner Game of Money
05:30 PM to 06:00 PM	CLOSING CEREMONY & VOTE OF THANKS

www.fpsb.in

KNOW YOUR SPEAKERS →

REGISTER HERE →

Exclusive Opportunity for CFP® Professionals: 50% Discount on “Psychology in Practice” Course

FPSB India is pleased to offer CFP® professionals in India exclusive access to “Psychology in Practice: Financial Planner Essentials in India” – an innovative course designed to strengthen client engagement through the lens of behavioural finance.

Launched globally in 2025, this groundbreaking program equips financial planning professionals with research-backed insights and practical strategies to better understand client behaviour, strengthen communication, build trust, and deliver more client-centric financial advice.

As a special benefit for CFP® professionals, the course is being offered at a 50% discounted fee for enrolments completed within the next three months

Course Fee: ₹24,000

Discounted Fee: ₹12,000

CPD Credits: Earn 15 CPD credits upon successful completion

Learning Flexibility: No fixed completion timeline – learn at your own pace and convenience.

While optional, the course is highly recommended for professionals looking to stay ahead in an increasingly competitive and evolving financial planning landscape.

Registration steps have been shared on your registered email address. For any queries, please write to enquiry@fpsb.in.

enquiry@fpsb.in

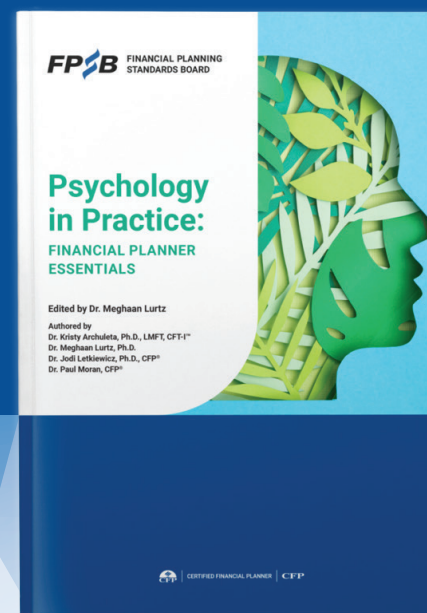


FPSB INDIA



FPSB® PSYCHOLOGY IN PRACTICE FOR CFP® PROFESSIONALS

An essential upskilling opportunity to strengthen and future-proof your financial planning expertise.



Avail an exclusive 50% discount on course enrolment for the next 3 months



Earn 15 CPD Points upon successful completion of the programme.

Latest Initiatives & Engagements

FPSB India Welcomes J K Shah Classes as an Authorised Education Provider

FPSB India is pleased to announce the signing of an MoU with J.K. Shah Classes as an Authorised Education Provider (AEP). A well-established and reputed institute in professional finance and commerce education, J.K. Shah Classes is known for its academic excellence, results-driven approach, and strong pan-India presence. This collaboration marks a significant step toward expanding access to quality financial planning education and strengthening the pathway for aspiring CFP® professionals across key markets.

The MoU signing was marked in the presence of Pooja Shah Dharia, Joint CEO, J.K. Shah Classes; Chandrakant Sureka, Chief Executive Officer, FPSB India; and Teena Rawal, Head of Business Development, FPSB India, along with team members including Biplab Mondal, Hardik Shah, Rajesh Singh, and Sharath Nambiar.

This partnership further reinforces the shared commitment to building a stronger and future-ready financial planning ecosystem in India.



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FPSB India Welcomes Another Authorised Education Provider – Navkar Digital Institute



Known for its strong digital reach, learner-centric approach, and commitment to quality education in the finance and accounting domain, Navkar Digital Institute will now offer aspiring professionals a structured pathway toward the globally respected CFP® certification.

The collaboration was formalized in the presence of Dr. CA Nihar Nanavati, Director, Navkar Institute; Teena Rawal, Head of Business Development, FPSB India; and Rajesh Singh, Regional Manager – Business Development, FPSB India.



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FPSB India is pleased to announce the onboarding of Navkar Digital Institute as an Authorised Education Provider (AEP), marking another important step in strengthening FPSB India's educational presence across the country.

This partnership further reinforces the shared commitment of both organizations to advancing high-quality financial planning education and preparing future-ready financial planning professionals grounded in competence, ethics, and trust.

FPSB India Scores a Hat-trick with the Onboarding of Third AEP This Month – GLOBALFTI

FPSB India is delighted to welcome GLOBALFTI as an Authorised Education Provider (AEP), marking the onboarding of the third AEP in the month and further strengthening FPSB India's education partner network. GLOBALFTI has been a trusted name in international finance education since 2007, offering specialized training in ACCA, CPA, CMA (USA), and IFRS, with over 5,000 alumni and a strong learner ecosystem supporting more than 100,000 students.

This collaboration expands opportunities for aspiring financial planning professionals to access quality learning and guided preparation toward earning the globally respected CFP® certification.

The association was formalized in the presence of Soumya Nambiar, Managing Director, GLOBALFTI; Teena Rawal, Head of Business Development, FPSB India; and Rajesh Singh, Regional Manager, FPSB India.

With partnerships like these, FPSB India continues to strengthen pathways for learners and contribute toward building a more trusted, competent, and future-ready financial planning ecosystem in India.



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FPSB India Signs Approved Corporate Partner MoU with PhillipCapital

FPSB India is pleased to announce the signing of an MoU with PhillipCapital as an Approved Corporate Partner, marking another significant milestone in strengthening industry collaboration within the financial planning ecosystem. A leading financial services group with a strong presence across retail and institutional segments in India, PhillipCapital offers a wide range of investment, broking, and wealth management solutions. This partnership reflects a shared commitment to advancing professional excellence and promoting the value of financial planning within the industry.

Representing FPSB India at the signing were Chandrakant Sureka, Chief Executive Officer, FPSB India, and Teena Rawal, Head of Business Development, FPSB India.



The PhillipCapital team included Joydeep Sen, Corporate Trainer & Consultant; Rodney Correa, Vice President – Fixed Income; Nihirt Parikh, Chief Financial Officer; and Dhruv Malde, Fixed Income Dealer.

This collaboration further reinforces FPSB India's efforts to build meaningful industry partnerships that support the growth of competent, ethical, and future-ready financial planning professionals in India.

FPSB India Signs Strategic MoU with Symbiosis International University



FPSB India is pleased to announce the successful signing of a tri-party Memorandum of Understanding (MoU) with Symbiosis School of Banking & Finance and Symbiosis International University. The MoU was signed in the presence of Chandrakant Sureka, Chief Executive Officer, FPSB India; Teena Rawal, Head – Strategic Alliances, FPSB India; and Sharath Nambiar, Management Trainee, FPSB India, representing FPSB India at the signing ceremony.

This landmark collaboration marks a significant step toward integrating financial planning education into mainstream academic curricula. Under this partnership, all colleges and institutes under Symbiosis International University will now be able to offer the CFP® Certification as part of their academic programs.

Recognized as a premier institute dedicated to nurturing future-ready talent in banking, finance, and financial services, Symbiosis School of Banking & Finance brings strong academic excellence and industry orientation to this collaboration.



Webinar

Missed our recent Webinar Series on – Part I: Specialized Investment Funds (SIFs) and Their Growing Relevance in Modern Portfolio Construction? Recording Now Available on YouTube

FPSB INDIA | **CFP®**

INVITES YOU TO AN EXCLUSIVE WEBINAR

PART I : SPECIALIZED INVESTMENT FUNDS (SIFS)
and Their Growing Relevance in Modern Portfolio Construction

 **Jatinder Pal Singh**
CEO - ITI Mutual Fund

 30th April 2026 (Thursday)
 4:30 PM - 5:30 PM IST



 **WATCH NOW**

FPSB India successfully conducted the first part of its exclusive webinar series titled “Specialized Investment Funds (SIFs) and Their Growing Relevance in Modern Portfolio Construction”, featuring Jatinder Pal Singh, Chief Executive Officer of ITI Mutual Fund.

The session provided valuable insights into the evolving investment landscape in India and explored how Specialized Investment Funds (SIFs) are emerging as a flexible and outcome-oriented investment solution. Participants gained a strong foundational understanding

of SIFs, their structure, and their growing relevance in portfolio diversification and risk-adjusted investing. As part of this two-part webinar series, the second session will further explore investment strategies and practical implementation of SIFs in client portfolios.

Missed the session or wish to revisit the insights? Watch the webinar recording on our YouTube channel.

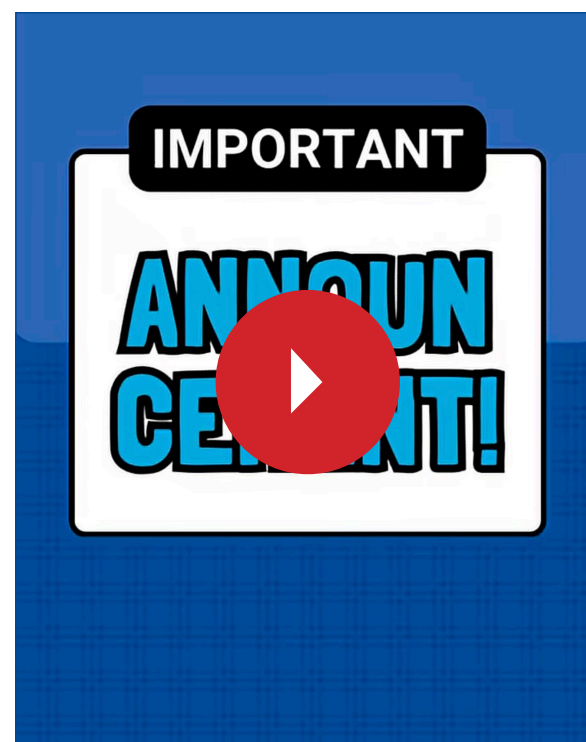
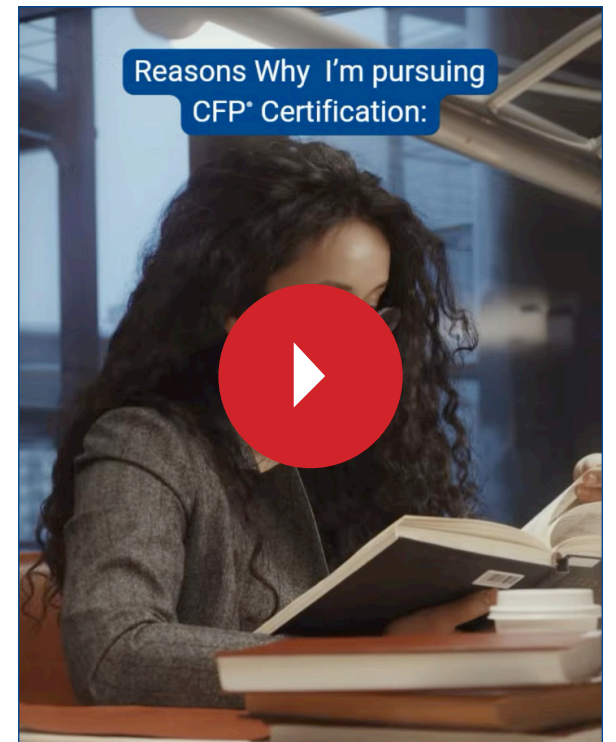
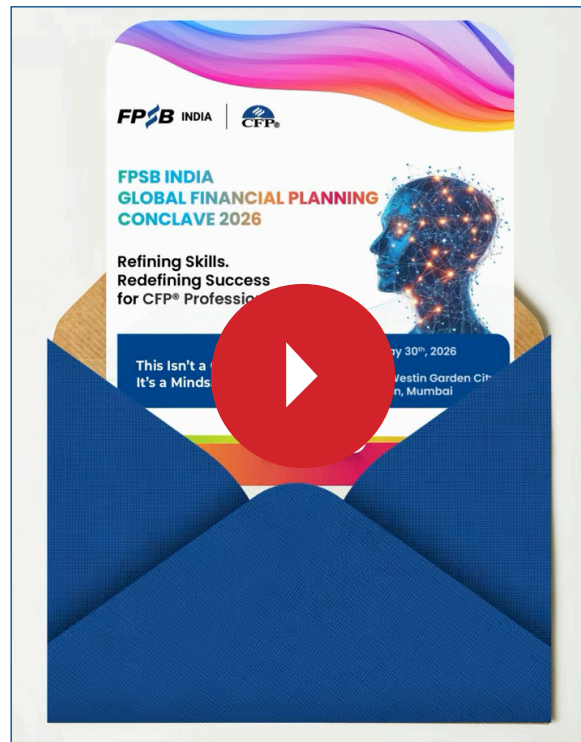
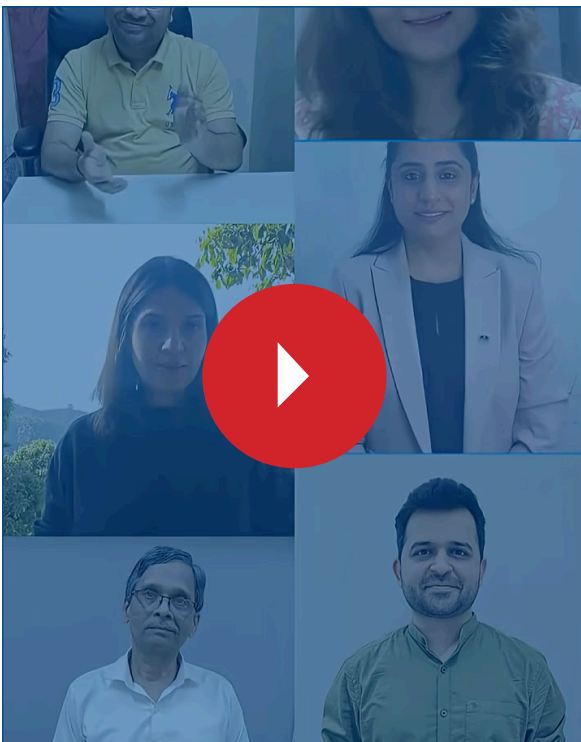
[Watch the full webinar on our YouTube channel](#)



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.

Youtube Videos

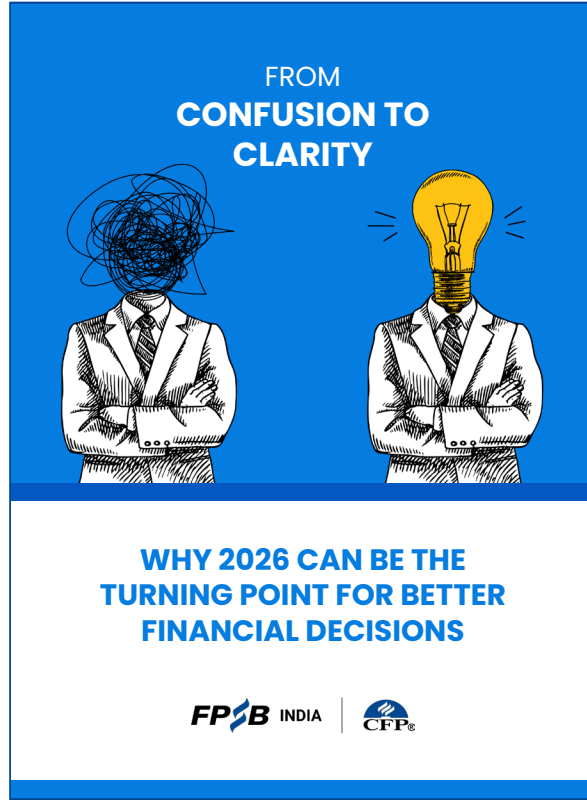


Linkedin Post



Superheroes Day

View Post



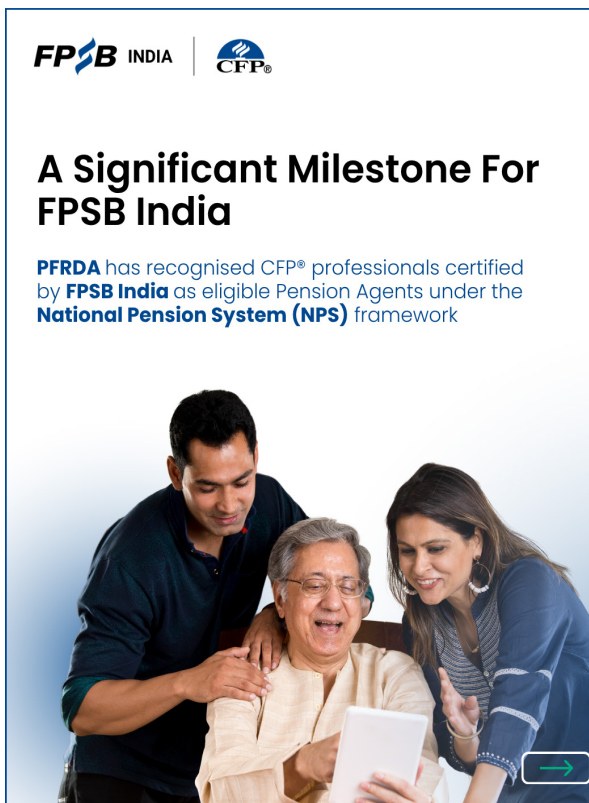
Newspaper Release

View Post



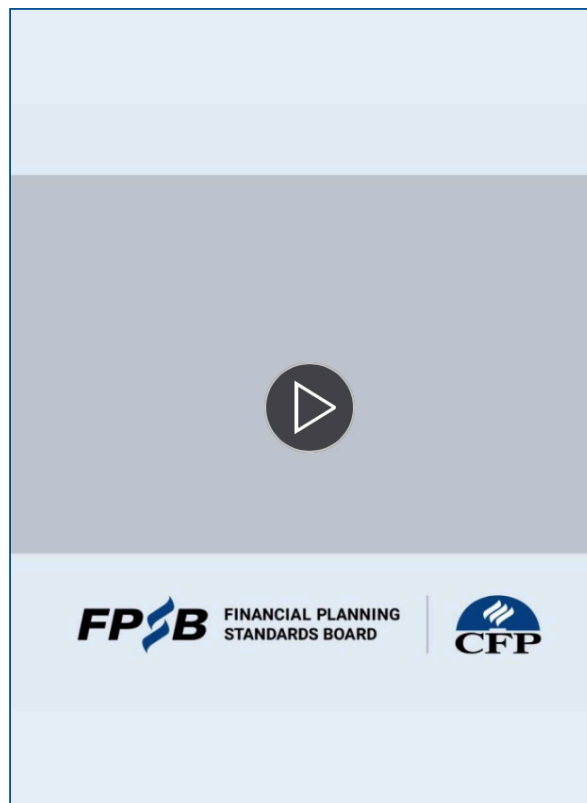
Akshaya Tritiya Post

View Post



PFRDA Post

View Post



Global Numbers Campaign

Watch the Video



April Fools Day

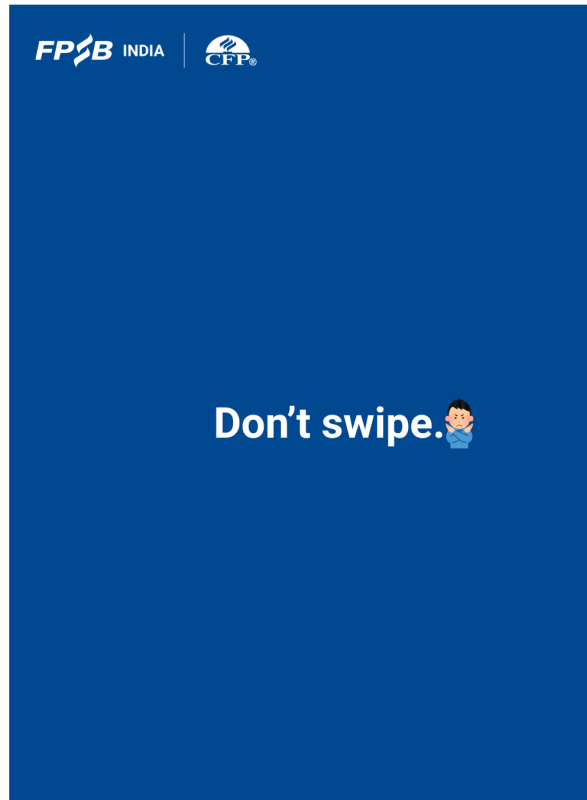
View Post



Instagram Post



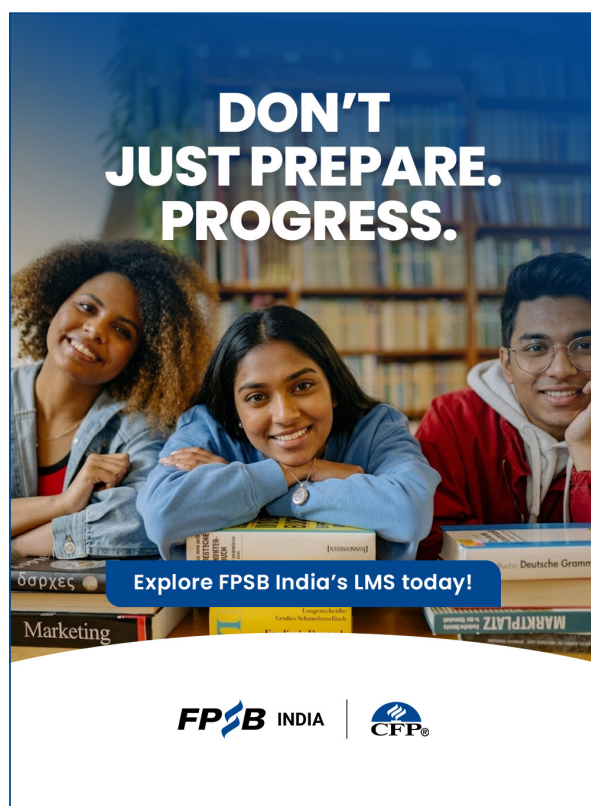
CFP testimonial new look



Trending carousel (Don't swipe)



Trending carousel (follow the footsteps)



Aspirational post for student progression.



Aspirational post for youngsters



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 in News

Outlook
MONEY

Industry story



CNBC
TV18

PFRDA & FPSB India



Chennai Patrika
site for your sight

PFRDA & FPSB India



BUSINESS NEWS
FOR
PROFIT!

PFRDA & FPSB India



Entrepreneurs News Room

News, Insights & Inspiration for Entrepreneurs

PFRDA & FPSB India



Global Biz News Room

Where Business Goes Global

PFRDA & FPSB India



A leading business news portal

**Business News
This Week**

PFRDA & FPSB India



WOMEN SHiNE

5 Upskill Yourself Ideas to remain financially fit



moneycontrol

Family, money, and future: How to prepare for life's key moments with confidence



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 am Nandita Athale, a former Computer professional turned CERTIFIED FINANCIAL PLANNER®.

I was one of the first few people in India to get a degree in Computer Science, and was in the field of software for over 15 years & was instrumental in spreading computer literacy in the 80s. At the age of 50, when most people are likely to look forward to their retirement and not want to learn anything new, I went on to become a CERTIFIED FINANCIAL PLANNER®. It helped me understand money mistakes I made.

Today, I am committed to helping everyone around to attain financial freedom. Most people know how to earn money but don't know how to invest and be financially free. Those who don't have pension, struggle to meet ends after their retirement or have to take some job due to inflation and money mistakes they made in their earning age.

CFP® certification has helped me understand the issues and guide people to become money aware and make their retirement carefree. It gives me immense satisfaction when people thank me for getting their finances right. The biggest achievement is my house help who is literally "lakhpati" and brings others to me for investment".



Nandita Athale CFP®

*Independent |
CERTIFIED FINANCIAL PLANNER®*

"The CFP® Certification Program has been a game-changer in my career, serving as the ultimate gateway into financial planning and advisory. Before obtaining my CFP® designation, I faced stiff competition in the job market. However, this globally recognized credential opened doors to advisory roles that demanded expertise in holistic financial planning, client-centric strategies, and ethical standards.

It equipped me with advanced skills in investment management, retirement planning, and risk assessment, directly leading to my current position as a financial advisor. The international recognition from FPSB has boosted my credibility, enabling me to serve diverse clients confidently. I highly recommend the CFP® program to anyone aiming for excellence in financial advisory".



Tejas Pardeshi CFP®

*Financial Advisor |
Wealthcrafts*

**BE A PART OF THE CONVERSATION - FOLLOW US
FOR UPDATES, INSIGHTS, AND MORE.**

