FPSB INDIA

CFP® Professionals CONNECT

NEWSLETTER
VOLUME 34
JULY 2026 EDITION

MESSAGE FROM THE CEO

Dear CFP® Professionals Family,

The financial planning profession is at an important inflection point. Across markets, the conversation is moving beyond products, transactions and returns towards long-term financial well-being, informed decision-making and the quality of advice people receive throughout their lives. This shift presents a significant opportunity for the profession and, importantly, for every CFP® professional who is helping shape it.

At FPSB India, we see our role as enabling this evolution by strengthening the foundations of the profession while preparing it for what lies ahead.

Our recent engagements continue to reflect this commitment. We have continued to build meaningful partnerships across the financial services and education ecosystem, including our strategic collaboration with Shriram Wealth and the renewed partnership with SIMSREE. These initiatives are opening pathways for professionals and students to develop deeper financial planning capabilities and explore the value of the CFP® certification. Our continued engagement with institutions and industry bodies is equally focused on creating greater awareness of financial planning as a profession and an essential life skill.

For the CFP® professional community, we are expanding access to knowledge and professional development through initiatives such as the Policy & Regulation Digest, Knowledge Hub, webinars and other learning resources. The objective is simple: to help professionals stay ahead of developments, strengthen their capabilities and bring greater value to their clients.

The conversations taking place globally are equally relevant to India. At the **APAC Summit 2026 in Auckland**, financial planning leaders from across New Zealand, Australia, South Africa and the wider APAC region explored the forces shaping the future of advice. One message stood out clearly: **longevity is changing the financial planning conversation.** Planning for a longer life requires more than building a retirement corpus; it requires a thoughtful approach to sustaining financial independence and quality of life across changing life stages.

Technology is another defining force. Artificial Intelligence is transforming how consumers access information and how professionals can analyse, personalise and deliver advice. Yet, as technology advances, the value of the human adviser becomes even more evident. **Trust, empathy, context and professional judgement remain at the heart of meaningful financial planning**. The opportunity before us is to use technology to augment these strengths, not replace them.

As the profession evolves, so must our collective ambition. We must continue raising professional standards, strengthening consumer awareness, encouraging continuous learning and building stronger bridges between academia, industry and the professional community.

I am confident that the next chapter for financial planning in India will be defined by greater professionalism, wider adoption and deeper relevance to consumers' lives. I thank each of you for your continued commitment to the profession and encourage you to embrace the opportunities that lie ahead.

Together, let us continue to raise the standard for professional financial planning in India.

Ramesh Vishwanathan

Chief Executive Officer, FPSB India

Latest **Initiatives & Engagements**

Shaping the Future of Financial Advice: Insights from APAC Summit 2026

Ramesh Vishwanathan, CEO, FPSB India, represented FPSB India at the ***APAC Summit 2026, hosted by Financial Advice New Zealand in Auckland,*** bringing back valuable perspectives on the evolving financial advice ecosystem. The Summit brought together leaders from New Zealand, South Africa, Australia and across APAC to discuss regulatory developments, best practices and the future of quality financial advice.

KEY TAKEAWAYS INCLUDED:

Planning for longevity:

As people live longer, financial planning needs to begin early and evolve with changing life stages to help individuals maintain financial security and quality of life throughout retirement.

Planning for the life you want:

Financial planning is not just about accumulating wealth, but about ensuring that your money enables you to enjoy life today while also supporting the quality of life you and your family aspire to in the future.

AI and the future of advice:

AI is providing customers with unprecedented access to information and creating opportunities to enhance the quality, efficiency and relevance of financial advice. However, AI will augment, not replace, the human element, with trust, empathy and professional judgement remaining at the heart of financial planning.

The Summit reinforced the importance of learning from global experiences and bringing these insights into the Indian financial planning ecosystem to create greater value for professionals, consumers and the broader industry.

VIEW LINKEDIN POST

FPSB India and Shriram Wealth Partner to Strengthen Professional Financial Planning

A significant step towards strengthening professional financial planning in India, FPSB India and Shriram Wealth have formalised a strategic partnership under FPSB India's Approved Corporate Partner Program, through the signing of a Memorandum of Understanding.

The MoU was signed by Ramesh Vishwanathan, CEO, FPSB India, and Naval Kagalwala, COO & Head of Products, Shriram Wealth, in the presence of Vikas Satija, Managing Director & CEO, Shriram Wealth; Teena Rawal, Director – Partnerships, FPSB India; and Sharath Nambiar, Management Trainee, FPSB India.

The partnership will provide Shriram Wealth employees with access to CFP® certification opportunities, supporting their professional development and strengthening their ability to deliver more holistic and client-centric financial advice. The collaboration also aims to advance employee upskilling and financial planning awareness.

VIEW LINKEDIN POST

From Classroom to Career: Shaping the Next Generation of Financial Planners

FPSB India recently engaged with the first and second batches of NISM's Post Graduate Program in Financial Planning (PGPFP), an integrated programme with CFP® certification, bringing together academic learning, industry perspectives and practical insights. From FPSB India, Ramesh Vishwanathan, CEO; Chandrakant Sureka; Teena Rawal; and Sharath Nambiar were present for the interaction.

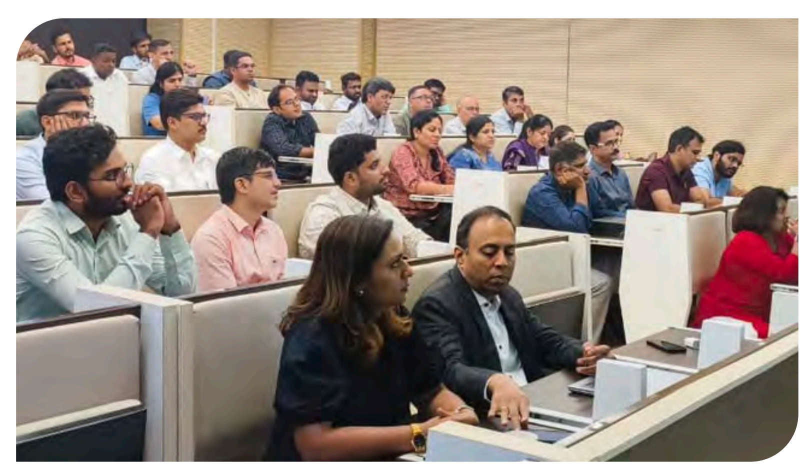
Ramesh Vishwanathan, CEO, FPSB India, addressed the students, highlighting the growing relevance of financial planning, the opportunities shaping the profession, and how the CFP® certification can help students build credible careers in the field.

In the webinar session, Chandrakant Sureka shared perspectives on the importance of the CFP® Program, its alignment with evolving industry requirements, and its relevance to the broader vision and objectives of the Government of India.

The session also moved from classroom concepts to real-world application, with CFP® professional Nisha Sanghavi taking students through practical case studies and demonstrating how financial planning decisions translate into meaningful client outcomes. The interaction was also attended by Sashi Krishnan, Director, NISM; Prof. Rachna; Prof. Meraj; Prof. Rajesh Krishnamoorthy; Prof. Amit Trivedi; and Manmeet Khurana, CFP®.

Together, FPSB India and NISM continue to strengthen the bridge between education, professional certification and real-world financial planning practice.

VIEW LINKEDIN POST



13th Council of Financial Planners Annual Retreat 2026: Conversations That Inspire Growth

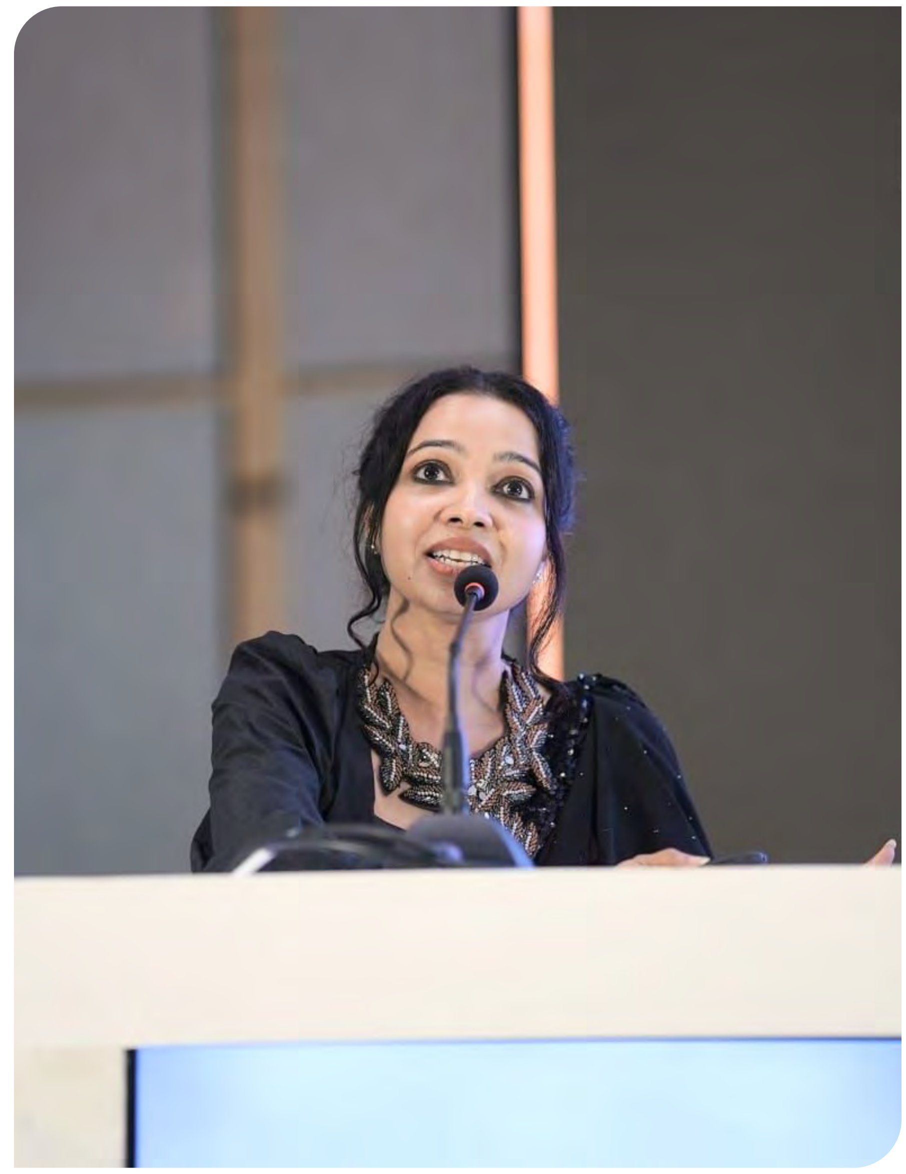
FPSB India participated as the Knowledge Partner at the 13th Council of Financial Planners Annual Retreat 2026, a platform that brought together meaningful discussions on the evolving landscape of financial planning and the future of the profession.

As part of the programme, Amisha Sethi, Senior Vice President – Policy & Communication, FPSB India, was invited to address the gathering on “Driving Growth for CFP® Professionals: Key FPSB India Initiatives.”

The session highlighted FPSB India’s ongoing efforts to support CFP® professionals through initiatives such as the Policy & Regulation Digest, Learning App, Knowledge Hub and other resources focused on continuous learning, professional development and industry engagement.

FPSB India remains committed to creating platforms and resources that empower CFP® professionals to stay informed, strengthen their capabilities and contribute meaningfully to the evolving financial planning ecosystem.

VIEW LINKEDIN POST



MBA Orientation Programme at SVKM's Narsee Monjee Institute of Management Studies (NMIMS) and Christ University

FPSB India participated in the MBA Orientation Programme at SVKM's Narsee Monjee Institute of Management Studies (NMIMS) and Christ University in Bengaluru, engaging with the incoming MBA cohort at the beginning of their academic journey.

Teena Rawal, Director – Partnerships, FPSB India, interacted with the students and shared insights on developing the right mindset, building future-ready skills, and achieving professional success while maintaining a strong sense of well-being and responsibility.

The session also introduced students to the growing field of financial planning, highlighting the increasing demand for qualified CFP® professionals, and the diverse career opportunities available to CFP® professionals across the financial services industry.

FPSB India thanks NMIMS and Christ University for the invitation and the opportunity to engage with the next generation of professionals and introduce them to the possibilities within the financial planning profession.

VIEW LINKEDIN POST

FPSB India and SIMSREE Renew Partnership to Strengthen Financial Education

FPSB India has renewed its MoU with Sydenham Institute of Management Studies, Research and Entrepreneurship Education (SIMSREE), reaffirming the commitment to advancing excellence in financial education and developing future-ready financial professionals.

The MoU was signed by Ramesh Vishwanathan, CEO, FPSB India, and Prof. Dr. Shriniwas Dhure, Director, SIMSREE, in the presence of Teena Rawal, Director – Partnerships, FPSB India, and Dr. Sangeeta Pandit, Head of Finance, SIMSREE.

Following the signing, Ramesh Vishwanathan addressed 100+ prospective students for the upcoming second batch of the M.Sc. in Finance + CFP® certification programme, sharing insights on the evolving role of financial planning and the opportunities it offers to aspiring finance professionals.

The session highlighted three key themes: financial planning as an essential life skill beyond a career, the success and momentum of the inaugural batch, and the growing opportunities for the next generation of financial leaders.

VIEW LINKEDIN POST

Know. Adapt. Stay Compliant

Monthly Regulatory Digest

The regulatory and policy landscape continues to evolve, bringing important developments for financial planning professionals. Our latest Monthly Regulatory & Policy Digest brings together key updates that may impact your practice, client advisory, compliance responsibilities, and business operations.

Explore the latest edition for a concise overview of recent developments, understand what they could mean for your professional practice, and stay prepared for changes that may affect you and your clients.

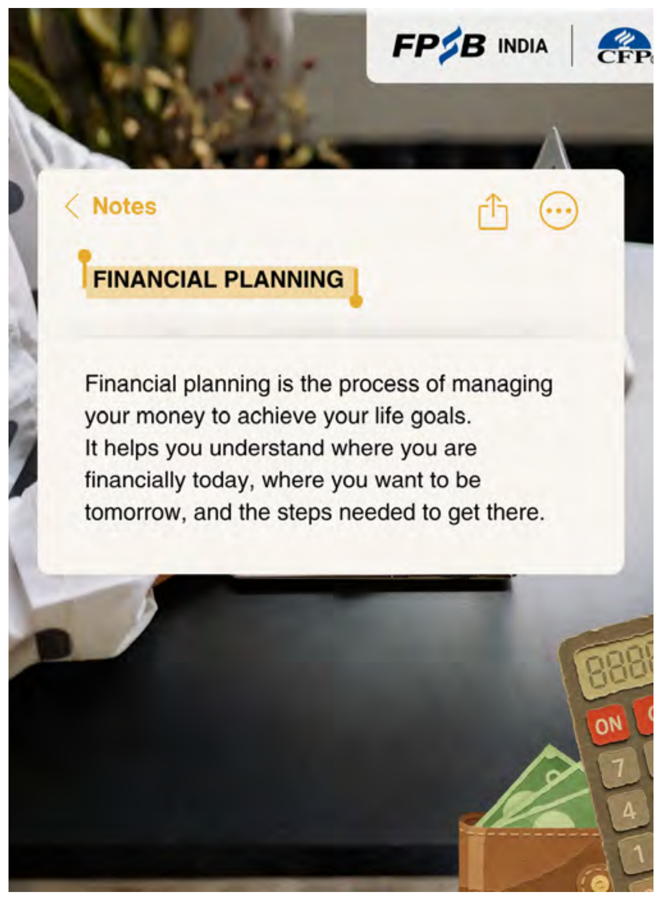
We encourage you to stay informed and take the necessary steps to align your practices with the latest requirements.

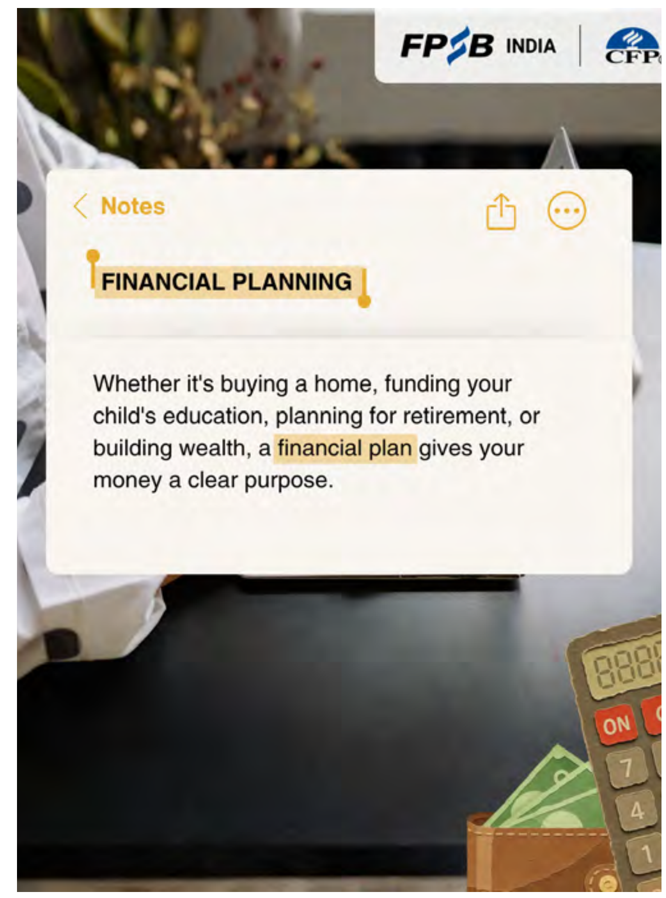
Read Here

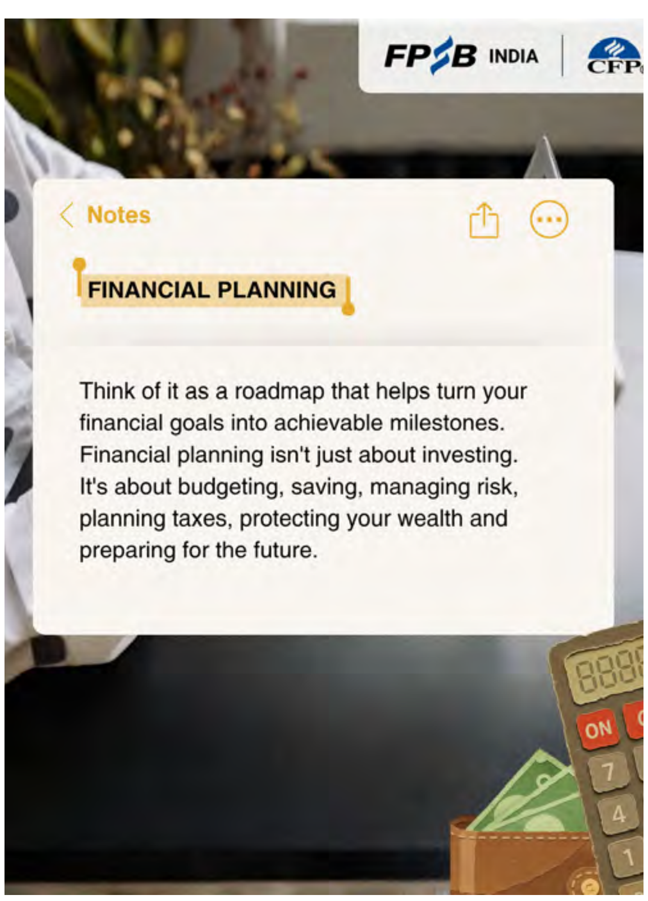
Upcoming **Webinar**

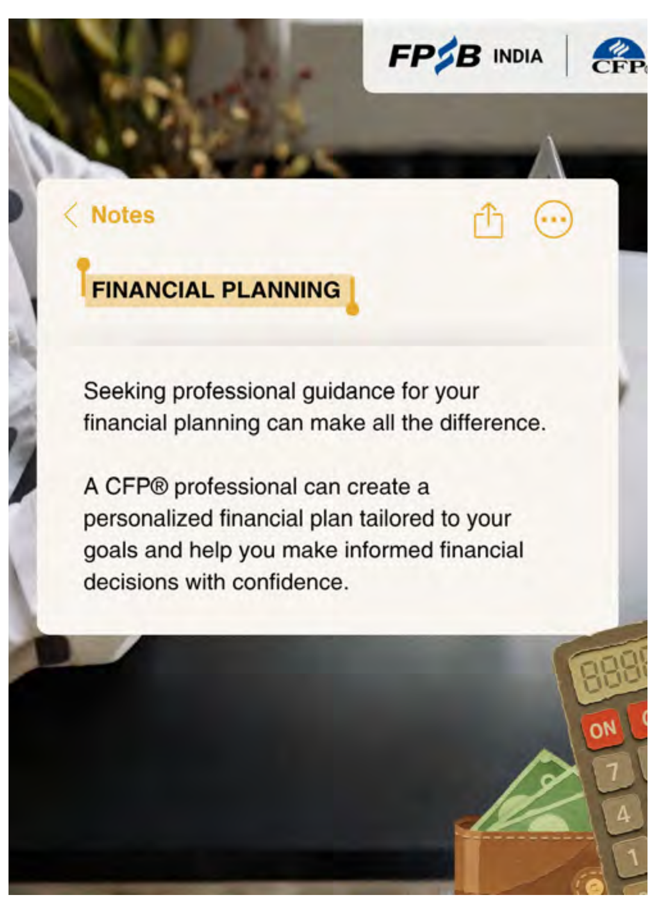
REGISTER NOW

Social Media Campaign Highlights









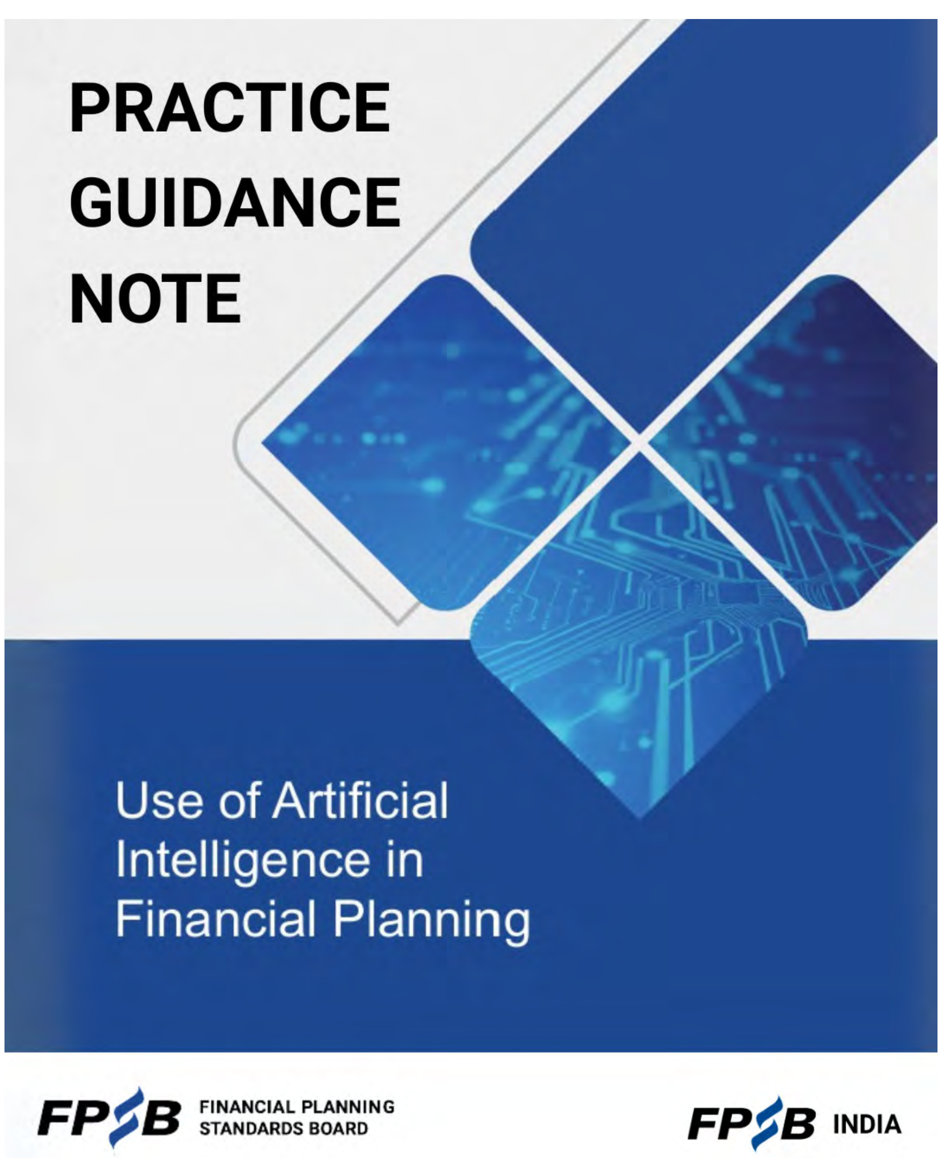

"I don't have a financial plan"
FPSB INDIA


"I invest without financial goals"
FPSB INDIA


"I don't have an emergency fund"
FPSB INDIA


"I chase every trending investment"
FPSB INDIA


"I believe it's too early to start financial planning"
FPSB INDIA


PRACTICE GUIDANCE NOTE
Use of Artificial Intelligence in Financial Planning
FPSB FINANCIAL PLANNING STANDARDS BOARD
FPSB INDIA


FPSB INDIA
CFP
Financial Success
Investment Strategy
Goal-Based Financial Planning
Risk Management
Tax Planning
Estate Planning
Retirement Planning

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


Hindustan Times

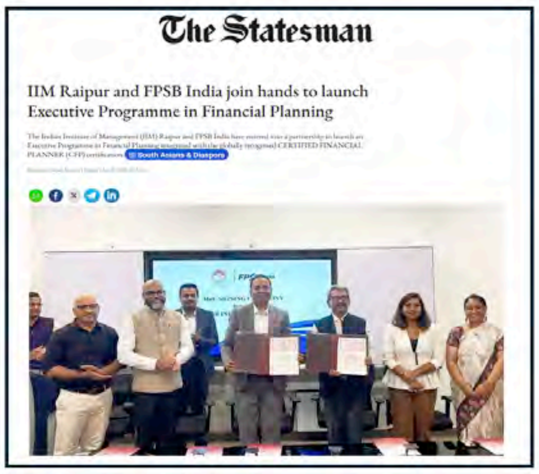
IIM Raipur, FPSB India to introduce executive programme integrated with CFP certification


PTI

IIM Raipur, Financial Planning Standards Board sign MoU for CFP executive programme

RAIPUR: (Jul 2) FPSB India, the Indian subsidiary of Financial Planning Standards Board Ltd. (FPSB), USA, has signed a memorandum of understanding (MoU) with Indian Institute of Management (IIM) Raipur in Chhattisgarh to launch an executive programme in financial planning integrated with the globally recognised Certified Financial Planner (CFP) certification.

In a statement, the FPSB said the 11-month executive programme aims to bridge the industry-academia gap by developing ethical, client-centric financial planning professionals equipped to meet the evolving needs of the financial services sector.


The Statesman

IIM Raipur and FPSB India join hands to launch Executive Programme in Financial Planning


edugraph

IIM Raipur, FPSB India to Launch Executive Course in Financial Planning with CFP Certification


BW EDUCATION

Executive Programme Integrates CFP Certification


NEWS by CAREERS360

IIM Raipur, FPSB India join hands to launch 11-month executive programme in financial planning


news nine

IIM Raipur, FPSB India launch executive programme in financial planning with CFP certification

FPSB India has signed an MoU with IIM Raipur to launch an 11-month executive programme in financial planning integrated with the globally recognised Certified Financial Planner (CFP) certification. Offered in a blended learning format, the course aims to bridge the industry-academia gap by equipping students and working professionals with management expertise, ethical financial planning skills and globally benchmarked professional credentials.


पंजाब केसरी

आईआईएम रायपुर और FPSB इंडिया की बड़ी पहल, अब वित्तीय नियोजन में मिलेगा वैश्विक स्तर का प्रशिक्षण

Bhawana Rawat


dailyhunt

IIM Raipur, FPSB India to Launch Executive Course in Financial Planning with CFP Certification


HTDS CONTENT SERVICES

IIM Raipur, FPSB India to introduce executive programme integrated with CFP certification


MBAGATE.IN


PNI

FPSB India Signs MoU with IIM Raipur to Launch Industry-Relevant Executive Programme Integrated with CFP® Certification


MENAFN

FPSB India Has Signed A Mou With IIM Raipur To Launch Industry-Relevant Executive Programme Integrated With CFP® Certification


Business News This Week

FPSB India has signed a MoU with IIM Raipur to Launch Industry-Relevant Executive Programme Integrated with CFP Certification


Cine Buzz News

FPSB India has signed a MoU with IIM Raipur to Launch Industry-Relevant Executive Programme Integrated with CFP Certification


ONLY EDUCATION

IIM Raipur, FPSB India Launch 11-Month Executive Programme in Financial Planning for Working Professionals

THE TIMES OF INDIA

IIM-Raipur signs MoU with FPSB for new prog

Raipur: FPSB India, the Indian subsidiary of US-based Financial Planning Standards Board Ltd. (FPSB), has signed a memorandum of understanding with Indian Institute of Management (IIM) Raipur on Thursday to co-create an executive programme in financial planning integrated with the globally recognised certified financial planner (CFP) certification, officials said.

The 11-month programme is designed to bridge the industry-academia gap by building future-ready competencies and developing ethical, client-centric financial planning professionals to meet evolving demands in the financial services sector. It will be offered in a blended learning format and will integrate CFP Certification through the Fast Track Pathway. TNN

The Pioneer

IIM, FPSB India join hands for CFP executive programme

PIONEER NEWS SERVICE
Raipur

FPSB India, the Indian subsidiary of Financial Planning Standards Board Ltd. (FPSB), USA, has signed a memorandum of understanding (MoU) with the Indian Institute of Management (IIM) Raipur in Chhattisgarh to launch an executive programme in financial planning integrated with the globally recognised Certified Financial Planner (CFP) certification, FPSB statement said on Thursday.

The 11-month executive programme aims to bridge the industry-academia gap by developing ethical, client-centric financial planning professionals equipped to meet the evolving needs of the financial services sector, it said. The programme will be offered in a blended learning format and will integrate the CFP certification through the Fast Track Pathway, combining IIM Raipur's academic expertise with globally benchmarked professional certification, it added. FPSB India CEO Ramesh Vishwanathan said the partnership reflects a shared commitment to raising professional standards in financial planning through academic excellence and globally recognised certification.

"The programme will prepare participants to think strategically, act ethically and deliver meaningful outcomes for clients' financial well-being," he said. IIM Raipur Director Incharge Prof Sanjeev Prashar said the collaboration would help address the growing demand for professionals with expertise in both management and holistic financial planning.

"We are delighted to partner with FPSB India to contribute to the country's financial education ecosystem by delivering industry-relevant education that bridges academia and practice," he said. The programme is designed to provide advanced management insights alongside professional financial planning expertise for students and working professionals, the statement said. The MoU was signed by Prof Prashar and Vishwanathan in the presence of officials from both institutions, it added. According to the institutions, the collaboration seeks to strengthen financial planning education in India by equipping participants with the knowledge, skills and strategic perspective required to meet the changing demands of the financial services industry, the statement added.

The partnership will also promote interdisciplinary and industry-oriented engagement through faculty collaboration, research and exposure to global developments in financial planning, wealth management and behavioural finance, it said.

नईदुनिया

आइआइएम व एफपीएसबी इंडिया के बीच हुई साझेदारी

नईदुनिया (वि.), रायपुर : इंडियन इंस्टीट्यूट आफ मैनेजमेंट (आइआइएम) रायपुर और फाइनेंशियल प्लानिंग स्टैंडर्ड्स बोर्ड (एफपीएसबी) इंडिया ने फाइनेंशियल प्लानिंग के क्षेत्र में उद्योग की जरूरतों के अनुरूप कौशल विकसित करने समझौता ज्ञापन पर हस्ताक्षर किए हैं। इसके तहत 11 माह का ब्लेंडेड एग्जीक्यूटिव प्रोग्राम शुरू होगा जाएगा, जो वैश्विक स्तर पर मान्यता प्राप्त सर्टिफाइड फाइनेंशियल प्लानर (सीएफपी) सर्टिफिकेशन से जुड़ा होगा।

इसका उद्देश्य उद्योग और शिक्षण संस्थानों के बीच की दूरी कम करना, आगे की जरूरतों के अनुरूप दक्ष पेशेवर तैयार करना तथा नैतिक और ग्राहक-केंद्रित फाइनेंशियल प्लानिंग को बढ़ावा देना है। इसे आइआइएम रायपुर की शैक्षणिक विशेषज्ञता के साथ ब्लेंडेड लर्निंग माडल पर चलाया जाएगा। प्रतिभागियों को फास्ट-ट्रैक पाथवे के माध्यम से सीएफपी सर्टिफिकेशन हासिल करने का अवसर भी मिलेगा। एफपीएसबी इंडिया के मुख्य कार्यकारी अधिकारी रमेश विश्वनाथन ने कहा कि यह पहल ऐसे पेशेवर तैयार करेगी, जो बदलते आर्थिक परिवेश में व्यक्तियों, परिवारों की जटिल वित्तीय जरूरतों को बेहतर सकें। वहीं आइआइएम रायपुर के प्रभारी निदेशक प्रो. संजीव प्रशार ने कहा कि यह साझेदारी फाइनेंशियल एजुकेशन इकोसिस्टम को मजबूत करने के साथ अकादमिक ज्ञान और व्यावहारिक अनुभव के बीच की दूरी कम करने में महत्वपूर्ण भूमिका निभाएगी।

पत्रिका

पत्रिका ZOOM रायपुर शनिवार, 4 जुलाई 2026

स्क्रीन प्ले पेज@04

एमओयू: एफपीएसबी इंडिया के साथ समझौते के बाद शुरू होगा 11 महीने का विशेष पाठ्यक्रम

आईआईएम रायपुर से अब बनेंगे प्रोफेशनल फाइनेंशियल प्लानर

उद्योग की मांग के मुताबिक तैयार होगा पाठ्यक्रम

दूरगामी परिणाम

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®

KNOW MORE

Testimonials

"Becoming a CFP® certificant has significantly reshaped my perspective on goal-based financial planning and disciplined wealth creation. With over 15 years of work experience in lending and managing large teams across multiple states, I have integrated these principles into my professional interactions as well.

I actively guide my team on the importance of budgeting, ensuring adequate insurance coverage aligned with individual needs, and effective tax planning. Additionally, I emphasize the critical role of long-term instruments such as Provident Fund and NPS in building a sustainable retirement corpus.

These conversations have strengthened team engagement and encouraged a more holistic approach to financial well-being, enabling individuals to make informed decisions and work steadily towards their life goals".

★★★★★

YOGESH LALWANI CFP®

Zonal Manager – Retail Finance
CreditAccess Grameen Limited

"Earning the CERTIFIED FINANCIAL PLANNER (CFP®) certification through FPSB India has been a transformative milestone in my career. The comprehensive curriculum went far beyond theoretical knowledge, equipping me with deep expertise in strategic asset allocation, risk management, and practical wealth management.

Beyond expanding my technical mastery, the designation has significantly enhanced my professional credibility. It gives my clients the utmost confidence that their financial goals are guided by rigorous global standards and an unwavering ethical framework.

The CFP® program has not only accelerated my career growth but also elevated the level of value and clarity I deliver to every investors".

★★★★★

FARAZ BADAR CFP®

Cluster Head
TATA Mutual Fund

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