FPSB INDIA

CFP® Professionals CONNECT

NEWSLETTER
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MESSAGE FROM THE CEO

Dear CFP® Professionals Family,

It is a privilege to join **FPSB India as Chief Executive Officer** at an important and exciting juncture for the financial planning profession in India. I am honoured to be part of an organisation that has, over the years, built a strong foundation for professional financial planning and established the CFP® certification as a mark of competence, ethics and professional excellence in India.

As I begin my journey with FPSB India, my priority will be to build upon this strong foundation, sustain the momentum that has been created, and take the organisation forward with renewed energy, fresh thinking and purposeful initiatives. The opportunity ahead is significant, and I believe our progress will be shaped by how effectively we continue to engage with and create value for our professional community and stakeholders.

A key area of focus will be strengthening our engagement with leading academic institutions and industry organisations. Our recent collaboration with the Indian Institute of Management Raipur is a meaningful step in this direction. The proposed 11-month blended Executive Education Programme in Financial Planning, integrated with the CFP® certification pathway, reflects our commitment to creating high-quality, industry-relevant learning opportunities and developing a strong pipeline of future financial planning professionals.

We intend to build on these partnerships and outreach initiatives, with **a strong focus on deepening our engagement with leading corporates and strengthening corporate partnerships across the financial services ecosystem**. By bringing together academia, industry and professional standards, we can create stronger pathways for talent, expand opportunities for CFP® professionals, enhance awareness of financial planning as a profession, and ensure that future practitioners are equipped to meet the evolving needs of clients and the financial services industry.

This focus on collaboration and continuous learning also extends to our engagement with the global financial planning community. I recently had the opportunity to **represent FPSB India at the APAC Summit 2026, hosted by Financial Advice New Zealand.** The Summit provided a valuable platform to engage with peers and leaders from across the region, exchange perspectives, and gain insights into emerging trends and best practices in financial planning. I look forward to bringing these learnings into our work as we continue to create greater value for our stakeholders in India.

As I begin this journey, I am also deeply grateful for the warm welcome and encouragement extended to me by our CFP® professionals, industry partners, media and news platforms, and the wider financial services community. The conversations and interactions I have had in these early weeks have been both encouraging and insightful, and have given me a deeper appreciation of the strength, commitment, and potential of our professional community.

Most importantly, I look forward to listening, learning and working together to shape the next chapter of financial planning in India.

The foundation is strong. The opportunity is significant. And the next phase holds immense promise.

Ramesh Vishwanathan

Chief Executive Officer, FPSB India

Highlights Of The Month

Setting New Benchmarks: Highlights from the FPSB India Global Financial Planning Conclave 2026 | 30th May 2026 | Mumbai

The FPSB India Global Financial Planning Conclave 2026 marked an inspiring start to the year, bringing together CFP® professionals, industry leaders, and global experts for a day of learning, collaboration, and meaningful conversations. We extend our heartfelt gratitude to our distinguished speakers, panelists, partners, and every participant whose enthusiasm and engagement made the conclave a resounding success.

Inaugural Session: The conclave commenced with an inspiring inaugural session led by **Chandrakant Sureka, Interim CEO, FPSB India, and Dante De Gori, CFP®, Global CEO, FPSB Ltd.,** who shared their vision for the future of financial planning and the growing role of CFP® professionals in an evolving global financial landscape.

The inaugural session also featured a **special address by Prof. M. Jayadev, Professor of Finance, Indian Institute of Management Bangalore (IIM Bangalore),** who shared valuable perspectives on the changing dynamics of financial planning and wealth management in India.

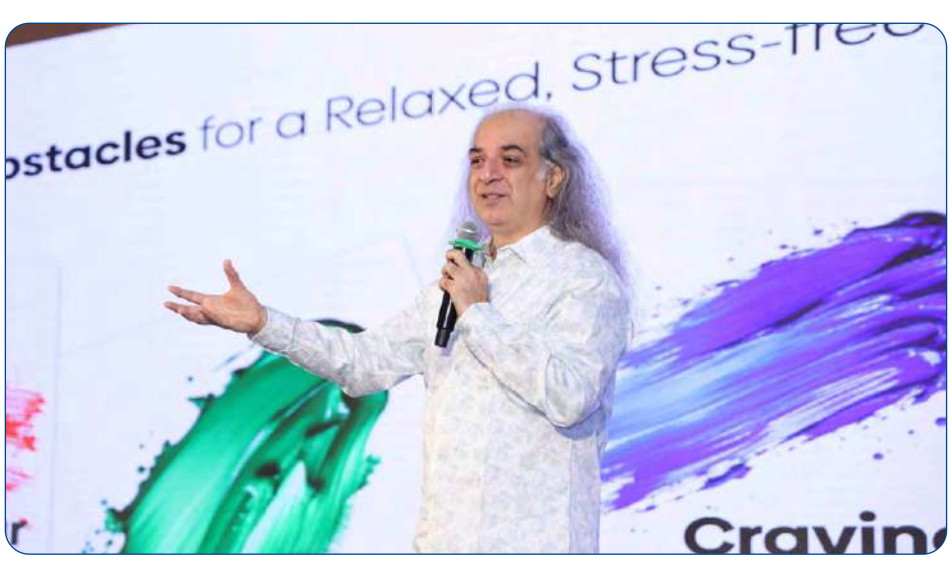
Expert Sessions

Growing Scope of Offshore Financial Practice by **David Sharpe, CFP®,** *Chair, Financial Advice Association Australia (FAAA)*

The Irreplaceable CFP® Professional Powered by AI by **Suketu Sanghvi,** *Founder, Zetheta*

Re-imagining the Family Office by **Rutul Shah**, *Partner & Co-founder, Aurtus Consulting LLP*

The Expanding Role of CFP® Professionals in GIFT CITY by **Pradeep Ramakrishnan** *Executive Director, IFSCA GIFT City*



The Inner Game of Money, an inspiring motivational session by **Khurshed Batliwala** and **Dinesh Ghodke** from *The Art of Living*, focusing on purpose, balance, and personal growth.

Insightful Panel Discussions

PANEL DISCUSSION 1

The New Playbook: Asset Allocation in Turbulent Times – Panelists: Pankaj Mathpal, CFP® CWM® - MD & CEO, Optima Money, Sunil Singhania - Founder & CIO, Abakkus Asset Manager Pvt Ltd, Abhishek Tiwari - CEO, PGIM India AMC, Rishi Nathany, CFP® - MD & CEO at Multi Commodity Exchange Clearing Corporation Ltd (MCXCCL), and Jatinder Pal Singh - CEO ITI AMC.

PANEL DISCUSSION 2

The Future of Wealth Advisory: Strategy, Scale & Sophistication – Panelists: Kalpesh S. Dave - Executive Director at W by Groww, Kirtan Shah, CFP® - Founder & CEO, Truvanta Wealth, Feroze Azeez - Joint CEO, Anand Rathi Wealth Management, Swati Kumari, CFP® - Founder, B Wealthy and Lovaii Navlakhi, CFP® - MD & CEO, International Money Matters Pvt Ltd.

The discussions offered practical perspectives on investment strategies, evolving client expectations, technology, and the future of wealth advisory.

Celebrating 20 Years of CFP® Certification Excellence

A special highlight of the conclave was the recognition of CFP® professionals who have completed 20 years of CFP® certification, celebrating their enduring contribution to the profession.

The honourees CFP® professionals included Madhu Sinha, B. Srinivasan, Lovaii Navlakhi, Rishi Nathany, Purav Mehta, Arvind Rao, Anil Chopra, Suraj Kaeley, Naresh Pachisia, and Suresh Sadagopan. Their dedication, leadership, and commitment continue to inspire the CFP® professional community.

We thank everyone who made the conclave a memorable success and look forward to welcoming you at our upcoming events. Stay connected through the FPSB India Events page and LinkedIn for future updates.

Media Coverage

Homecoming Campaign Returns!

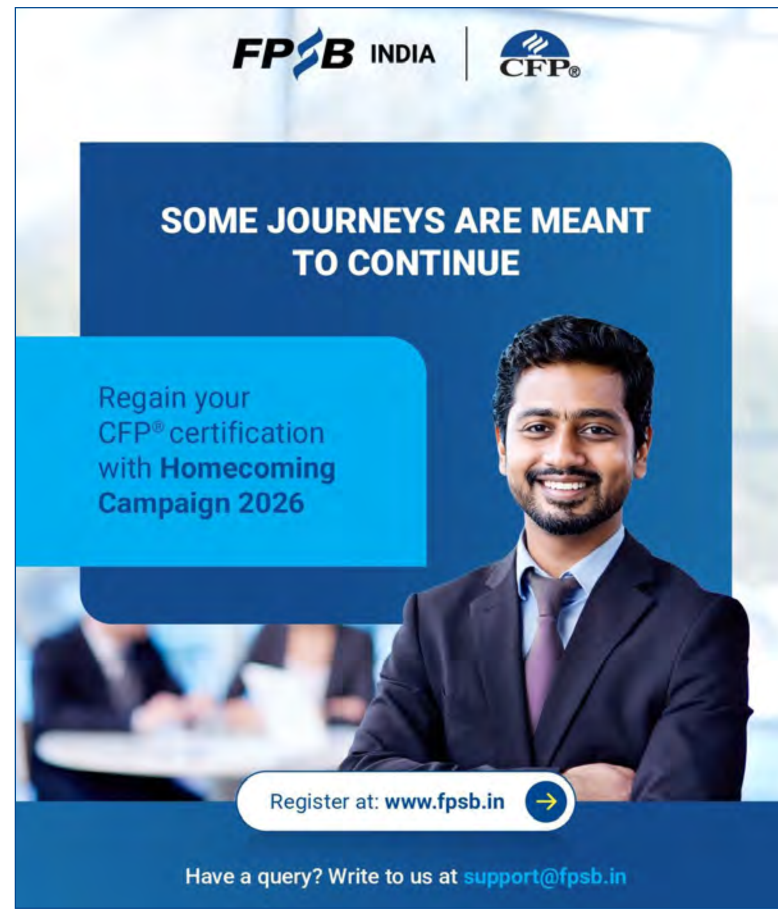
FPSB India is pleased to relaunch the **Homecoming Campaign 2026,** a special initiative designed for former CFP® professionals whose certification has lapsed for more than five years and who wish to regain their CFP® certification.

The campaign offers an opportunity to reconnect with the CFP® professional community and once again benefit from an internationally recognized credential, continuous professional development, networking opportunities, and the high standards associated with CFP® certification.

Eligibility: Applicants must have previously held CFP® certification that expired more than five years ago and should be able to demonstrate that they have been actively practising financial planning.

How to Apply: Eligible candidates are requested to email their expression of interest, along with details of their previous CFP® certification, to support@fpsb.in. FPSB India will verify the applicant's eligibility and certification records before sharing further registration instructions with eligible candidates.

We look forward to welcoming former CFP® professionals back to the growing FPSB India community.



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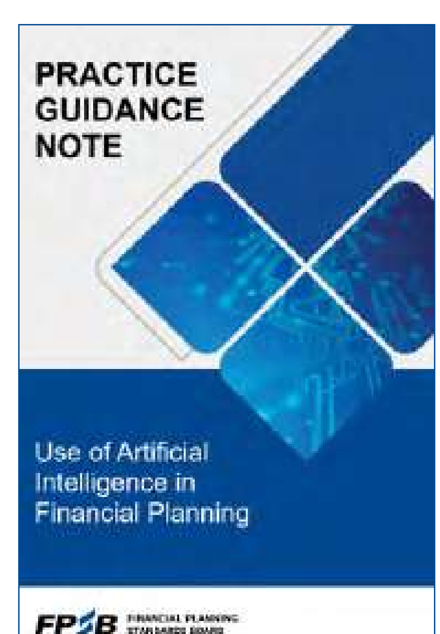
New from FPSB: Practice Guidance Note on the Use of Artificial Intelligence in Financial Planning

PSB has released a new Practice Guidance Note on the Use of Artificial Intelligence in Financial Planning. Developed in response to growing global adoption of AI, the guidance helps financial planning professionals use AI responsibly while upholding the highest standards of ethics and professionalism.

The guidance provides practical recommendations on leveraging AI to enhance efficiency, insights, and client service while reinforcing the importance of professional judgment, human oversight, transparency, confidentiality, and accountability. As AI becomes increasingly integrated into financial planning, these principles remain fundamental to maintaining client trust and delivering quality advice.



Learn More **Access & Download Here**

Latest **Initiatives & Engagements**

FPSB India Welcomes Ramesh Vishwanathan as Chief Executive Officer

FPSB India is pleased to announce the appointment of Ramesh Vishwanathan as its new Chief Executive Officer. With over 25 years of leadership experience in the financial services industry, Ramesh brings deep expertise in business growth, strategic partnerships, and customer-centric innovation. He will lead FPSB India in advancing the financial planning profession and strengthening the value of CFP® certification across the country.

> *I am honoured to join FPSB India at an exciting phase of growth for the financial planning profession. I look forward to working closely with industry stakeholders and CFP® professionals to further enhance awareness around financial planners who commit to ethics and competency standards and contribute towards the vision of a financially empowered Viksit Bharat.*
>
> **— Ramesh Vishwanathan**

We warmly welcome Ramesh to the FPSB India family and look forward to this exciting new chapter.

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FPSB India Partners with IIM Raipur to Launch Executive Education Programme Integrated with CFP® Certification

FPSB India has signed a Memorandum of Understanding (MoU) with the Indian Institute of Management (IIM) Raipur to co-create an industry-relevant Executive Education Programme in Financial Planning integrated with the globally recognized CFP® Certification through the Fast Track Pathway. The programme is designed as an 11-month blended learning course that combines academic excellence with practical, industry-focused financial planning education.

The MoU was signed by Prof. Sanjeev Prashar, Director In-charge, IIM Raipur, and Ramesh Vishwanathan, Chief Executive Officer, FPSB India, in the presence of senior representatives from both institutions. Representing FPSB India were Teena Rawal, Director - Partnerships, and Rajesh Singh, Regional Manager – Business Development. From IIM Raipur, the ceremony was attended by Prof. Satyasiba Das, Dean – External, Prof. Yogesh Chauhan, Area Chairperson, Dr. Pradiptarathi Panda, Professor – Finance, and Prof. Ritu Gupta, Chairperson – E-Learning.

This strategic collaboration aims to bridge the industry-academia gap by equipping aspiring financial planning professionals with future-ready competencies, ethical practices, and globally benchmarked knowledge.

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The announcement also received widespread coverage across national, business, education, and regional media, underscoring its significance for the future of financial planning education in India.

Media Coverage →

FPSB India Welcomes PGIM India Mutual Fund as an Approved Corporate Partner (ACP)

FPSB India signed a Memorandum of Understanding (MoU) with PGIM India Mutual Fund, welcoming the organization as its newest Approved Corporate Partner. The partnership reflects a shared commitment to strengthening the financial planning profession, developing skilled talent, and promoting the globally recognized CFP® Certification across the industry.

The MoU was signed in the presence of Abhishek Tiwari, Chief Executive Officer, PGIM India Mutual Fund, and Ravi Samalad, Assistant Vice President, PGIM India Mutual Fund. Representing FPSB India were Dante De Gori, CFP®, Global CEO, FPSB Ltd., Chandrakant Sureka, Interim CEO, FPSB India, Teena Rawal, Director - Partnerships, FPSB India and Sharath Nambiar – Mgmt Trainee, FPSB India.

Through this collaboration, both organizations will work together to create opportunities for financial professionals, enhance industry standards, and contribute to building a stronger, more competent, and client-centric financial planning ecosystem in India.

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FPSB India Signs MoU with Franklin Templeton Academy

FPSB India signed a Memorandum of Understanding (MoU) with Franklin Templeton Academy, marking another significant step towards strengthening financial planning education and promoting the CFP® Certification. The partnership aims to encourage aspiring finance professionals to pursue globally recognized financial planning credentials and build future-ready capabilities.

The MoU was signed in the presence of Chandrakant Sureka, Interim CEO, FPSB India, and Juzer Tambawalla, Director, Franklin Templeton Academy. As the learning and development arm of Franklin Templeton, the Academy is widely recognized for delivering industry-relevant education and professional development initiatives within the mutual fund distribution ecosystem.

Through this collaboration, Franklin Templeton Academy will actively promote the CFP® Certification among its learner community, supporting the development of competent, ethical, and client-centric financial planning professionals in India.

FPSB India Welcomes Authorised Education Provider – Miles Education

FPSB India is pleased to welcome Miles Education as its newest Authorized Education Provider (AEP), strengthening the pathway for aspiring CFP® professionals.

The partnership was formalized in the presence of Chandrakant Sureka, Interim CEO, FPSB India, Teena Rawal, Director - Partnerships, FPSB India, Varun Jain, CPA, CMA, Founder & CEO, Miles Education, along with Padmini Rao and Shanjali Shahi from Miles Education.

This collaboration brings together FPSB India's globally recognized CFP® Certification Programme and Miles Education's expertise in professional education, with a shared commitment to developing competent, ethical, and future-ready financial planning professionals across India.

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FPSB India Welcomes Another Authorized Education Provider: edZeb

Continuing its efforts to expand access to quality financial planning education, FPSB India is pleased to welcome edZeb as its second Authorized Education Provider (AEP) onboarded this month.

The partnership was formalized in the presence of Teena Rawal, Director - Partnerships, FPSB India, Rajesh Singh, Regional Manager – Business Development, FPSB India, CA Amit Jugia, Co-Founder & CEO, edZeb, and CA Akhil Iyer, Co-Founder & CLO, edZeb.

This collaboration will provide aspiring finance professionals with greater access to the globally recognized CFP® Certification Programme and reflects our continued commitment to strengthening the financial planning education ecosystem in India.

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Journal of Financial Planning in India
June 2026 Edition Released

FPSB India is pleased to announce the release of the June 2026 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.

Read Here

Webinar

Missed the session or wish to revisit the insights? LEARN & STAY AHEAD

FPSB India continues to support the professional development of CFP® professionals through its expert-led webinar series.

May 2026: “Part II – Specialized Investment Funds (SIFs) and the Future of Investing: Strategies for Long-Term Wealth Creation”

Featuring Rajesh Bhatia, Chief Investment Officer, ITI Mutual Fund, this session explores the growing role of Specialized Investment Funds (SIFs), portfolio construction, asset allocation, and long-term wealth creation.

Watch Nowv

June 2026: “Portfolio Allocation and Fixed Income”

Joydeep Sen, CFP®, Corporate Trainer, Author & Columnist, shares valuable insights on asset allocation, fixed income strategies, debt investments, and interest rate outlooks for building resilient portfolios.

Watch Now

July 2026: “Tax Strategies for Investment Decisions”

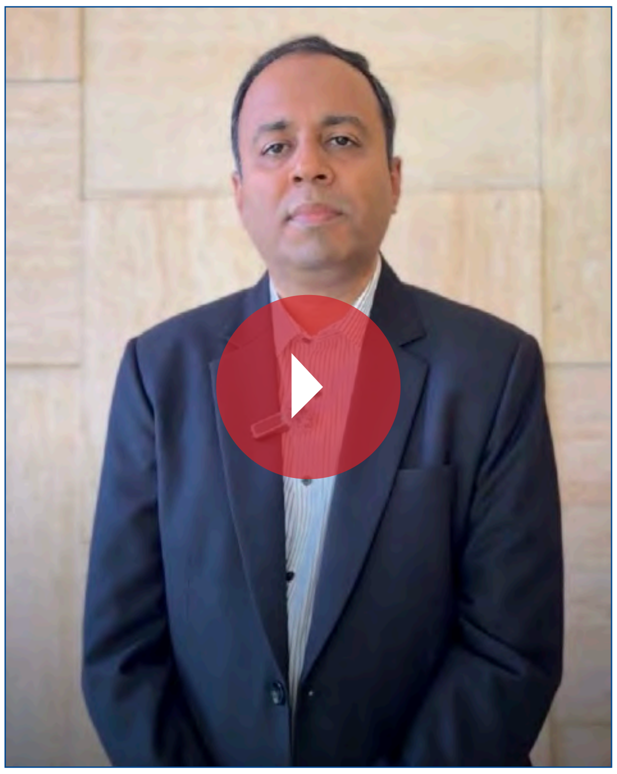
Featuring Harminder Garg, CFP®, Founder & Chief Mentor, IIFC, this practical session covers tax-efficient investing, Section 87A rebate, gift taxation, clubbing provisions, and tax harvesting strategies for financial planning professionals.

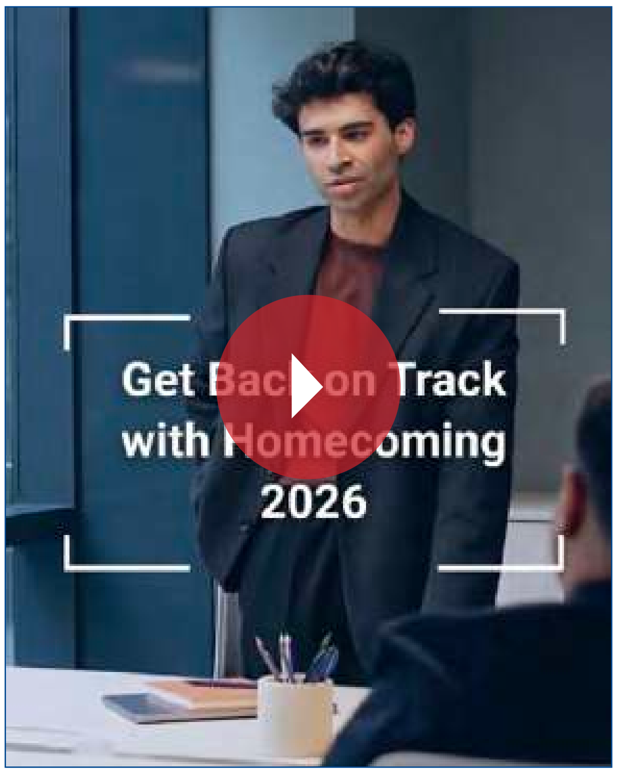
Watch Now

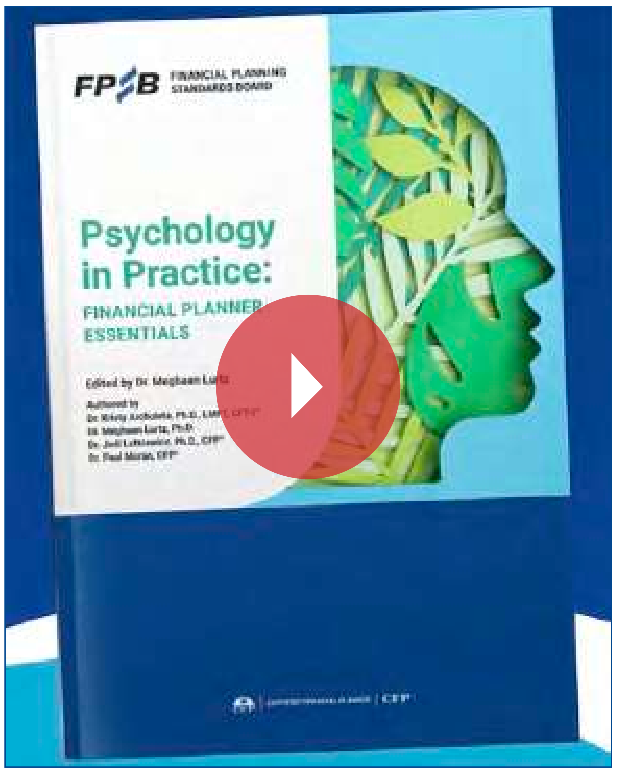
Social Media Campaign Highlights

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.

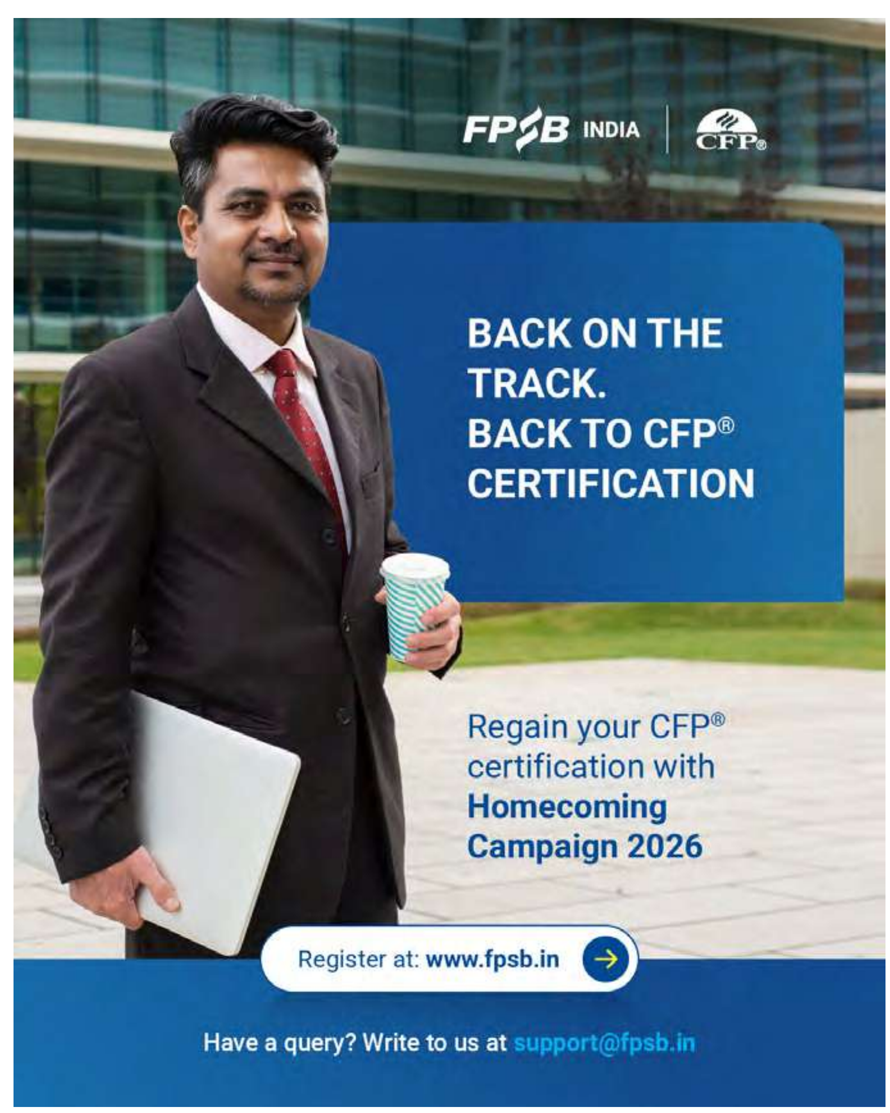
Youtube Videos







Linkedin & Instagram Post



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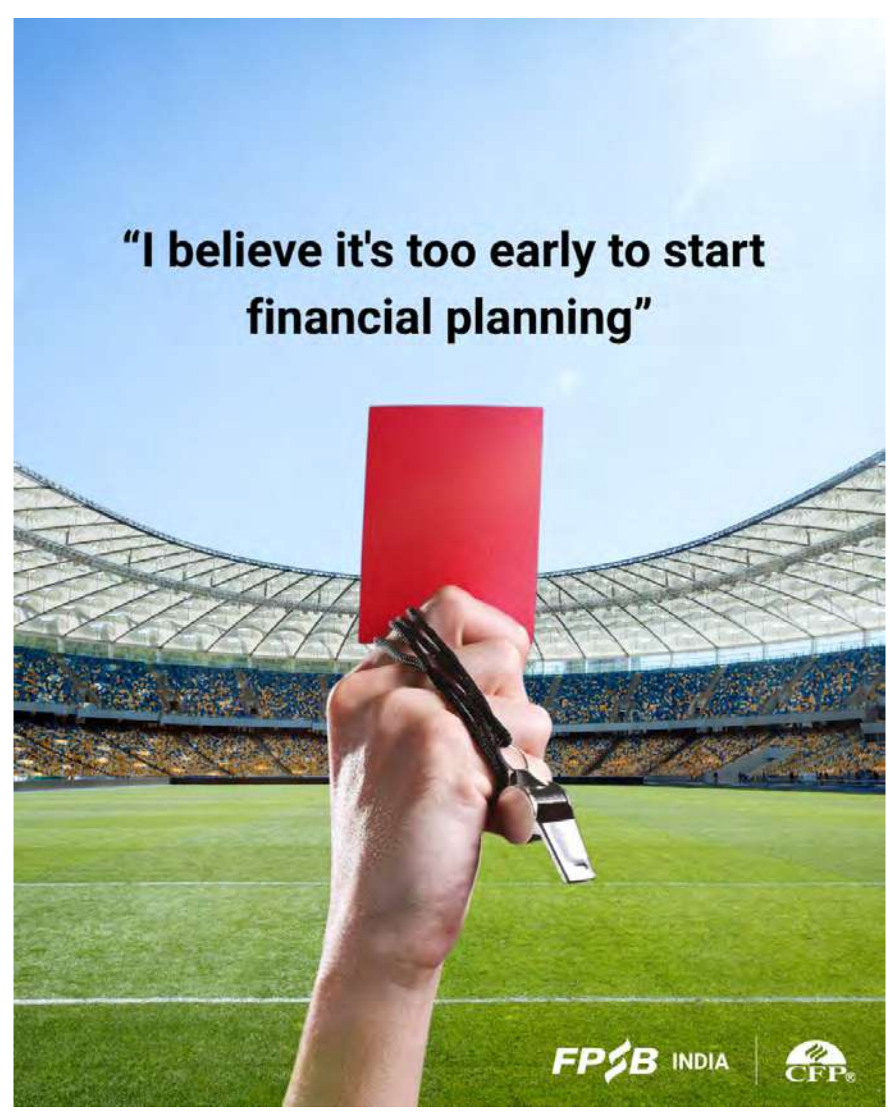

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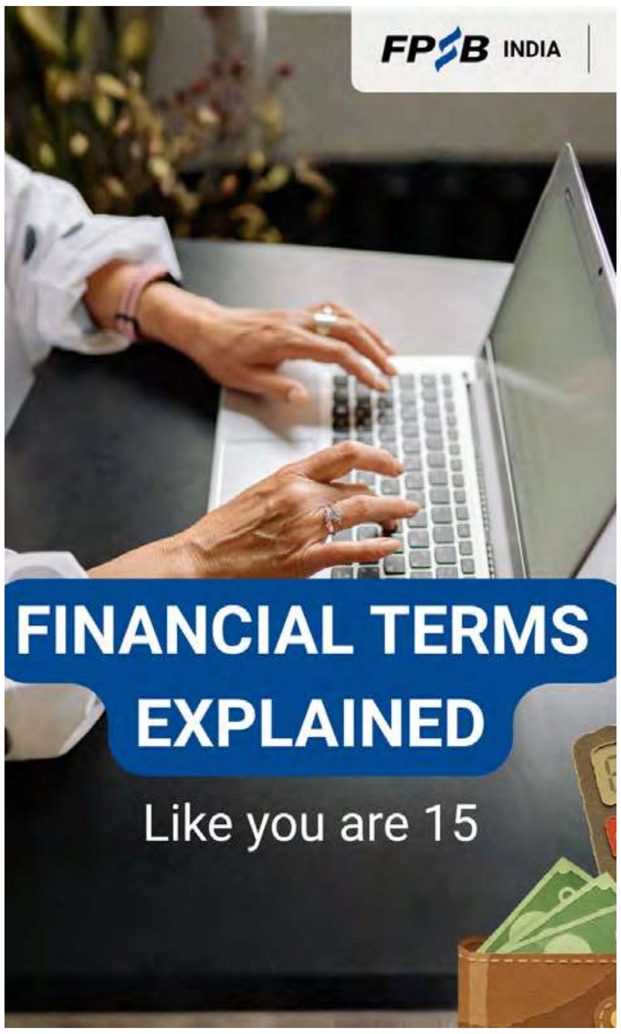

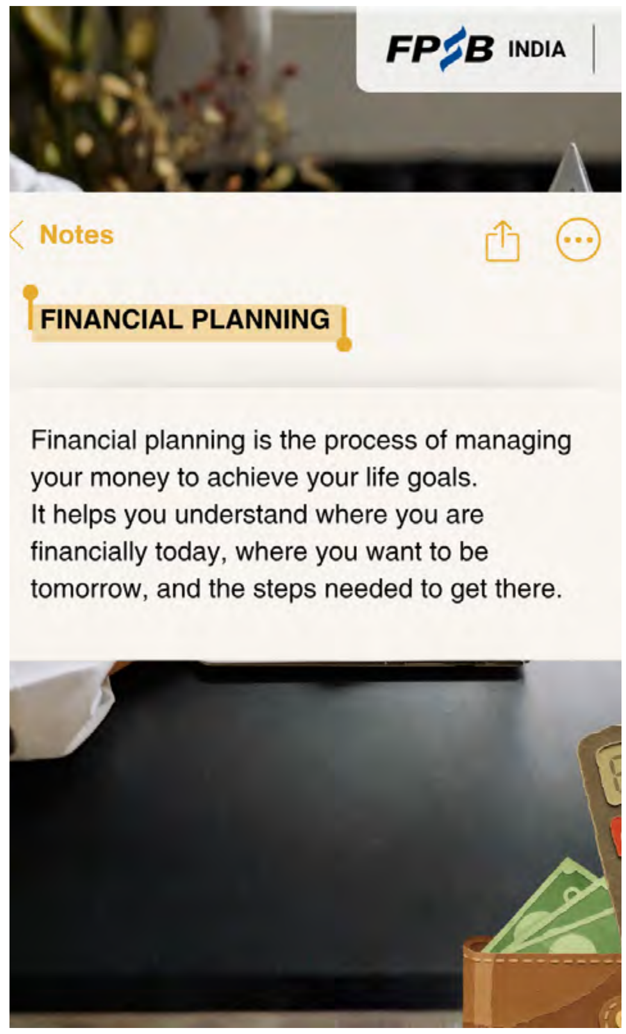

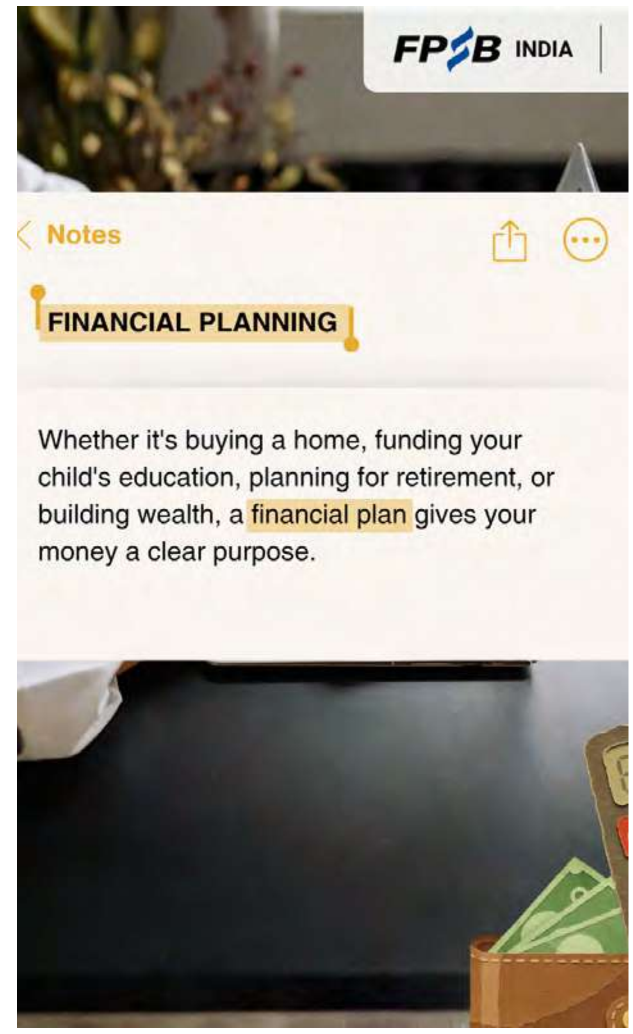

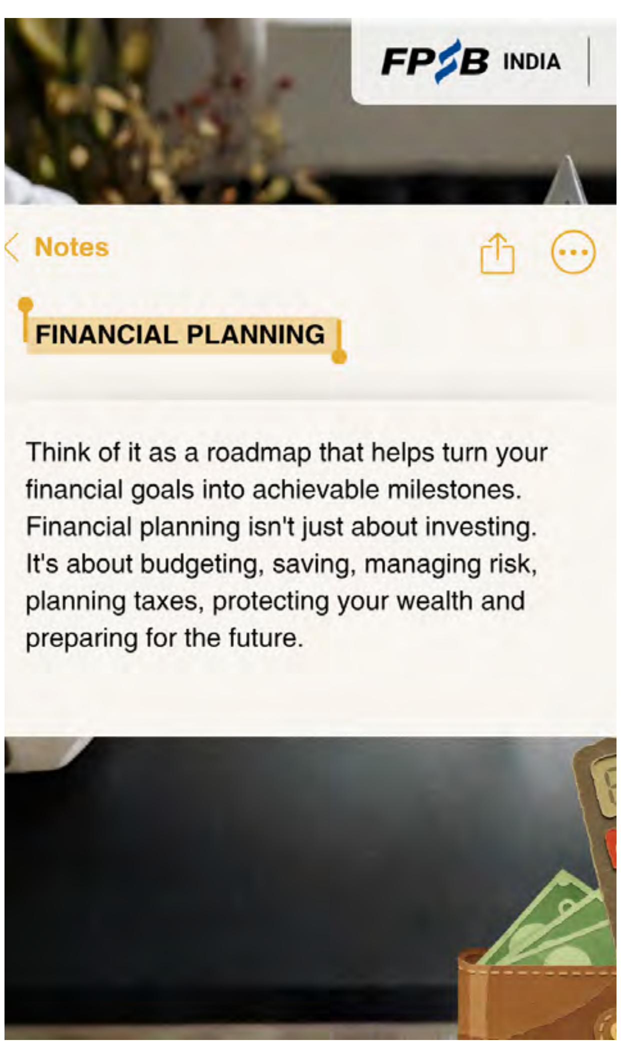

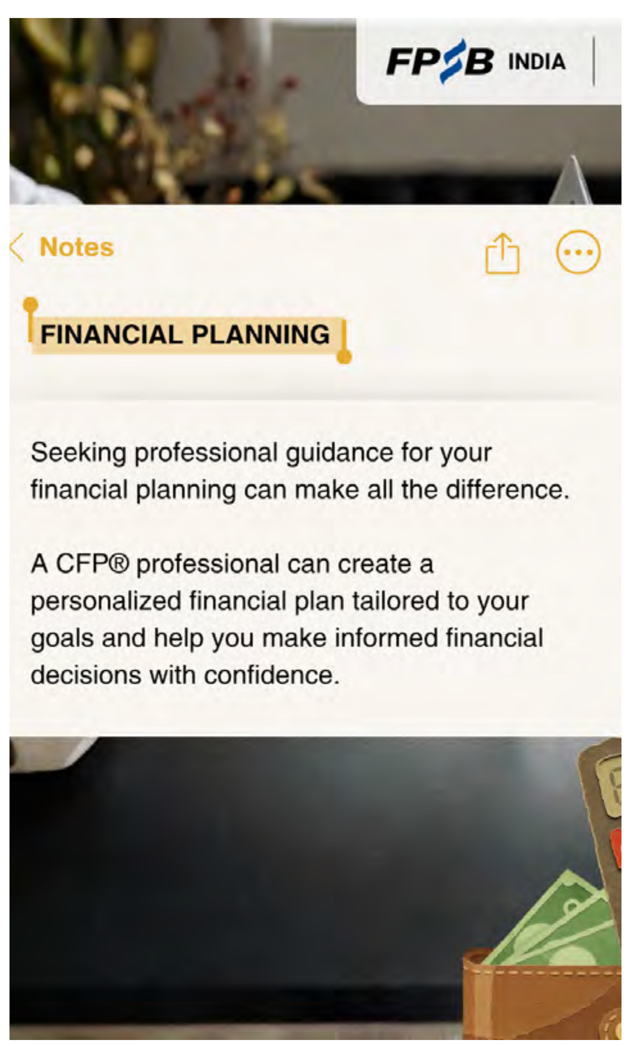

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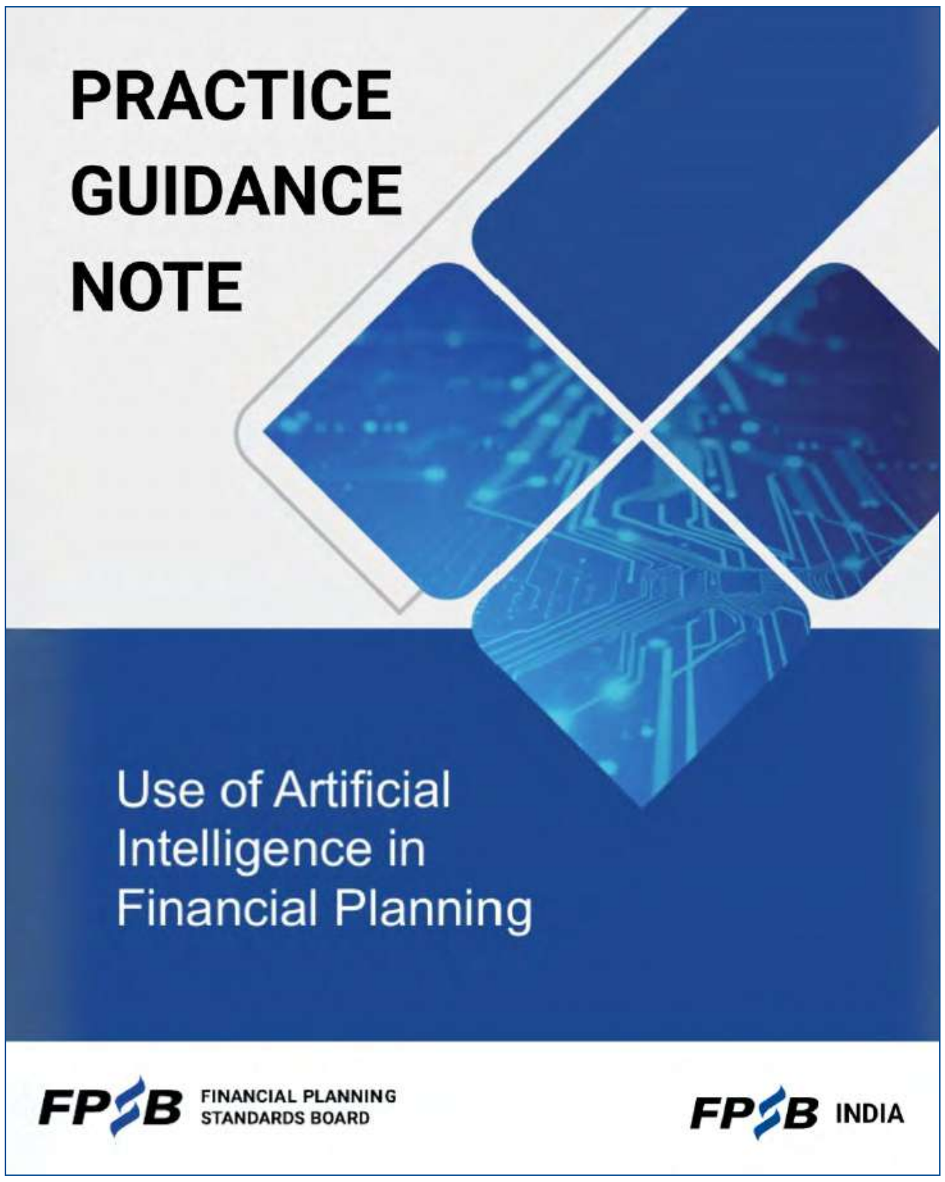

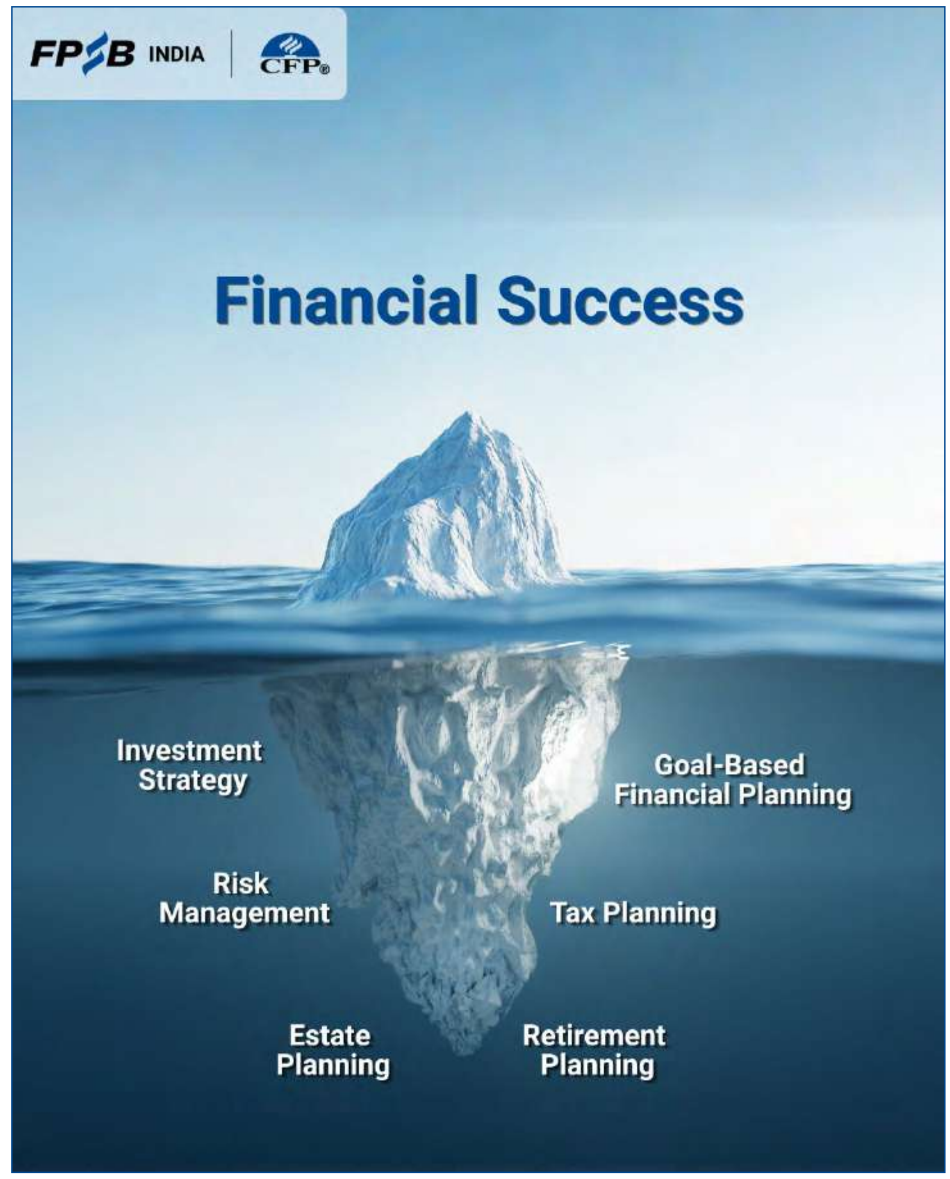

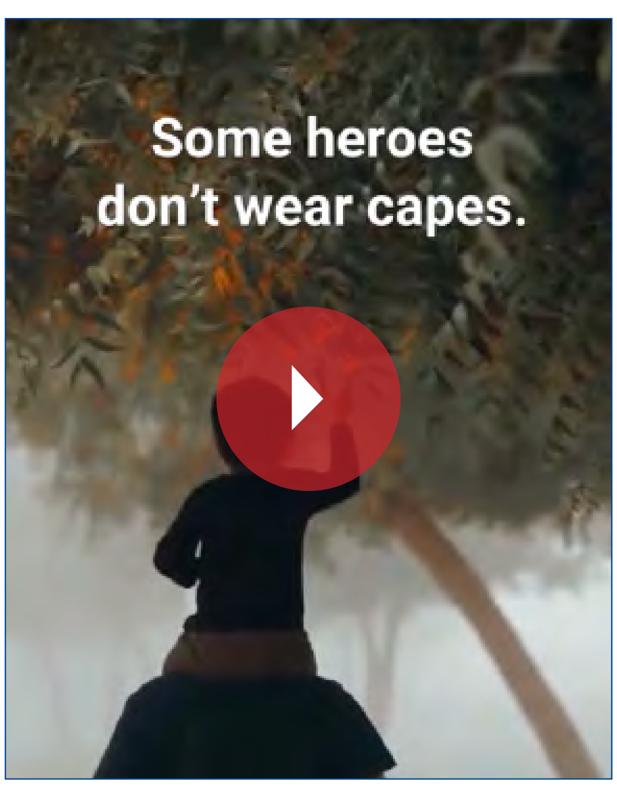

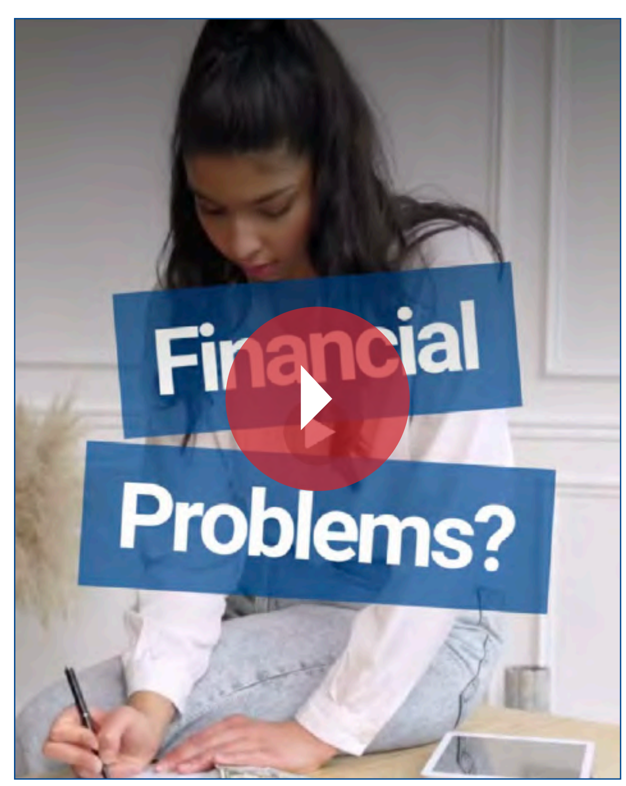

Spotlight **News!**

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:

FPSB India in News

The Economic Times — Mother's Day Special: How AI, apps are empowering women to manage finances, improve health, build career

shethepeople (A GLOBAL MOVEMENT BY & FOR WOMEN) — Why Financial Security Is The Most Meaningful Gift For Women

edex LIVE — The changing face of careers in finance: Why advisory skills are becoming more valuable than ever...

The Economic Times — Your monthly spend also decides how soon you can retire: Expense tracking apps, AI tools are changing how Indians invest

The Economic Times — FPSB India names **Ramesh Vishwanathan** CEO to drive growth of financial planning profession

Outlook Money — The Greatest Gift A Father Can Give: Financial Security And Peace Of Mind

moneycontrol — Financial wellness for all: The power of tax planning, saving discipline, and intelligent investing for a brighter tomorrow

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

"20 years back, I came to financial planning as a CA, tax was my training and my instinct. The CFP® certification programme gave me what the CA curriculum doesn't set out to provide: a structured, holistic view of a client's financial life; goals, investments, risk, retirement, and protection, all seen as one connected whole.

What struck me was how naturally the two qualifications complemented each other. Tax depth from CA. Financial planning breadth from the CFP® curriculum. Together they made possible the integrated practice I now run.

For a CA in financial advisory, CFP® certification is not a replacement. It is the other half of the picture."

★★★★★

ARVIND RAO, CFP®

Founder
Arvind Rao & Associates

"The CFP® Certification Program has been one of the most valuable learning experiences of my professional journey. It transformed my perspective from simply understanding financial products to developing comprehensive, goal-based financial plans tailored to clients' needs.

The curriculum strengthened my knowledge of investments, insurance, taxation, retirement, and estate planning while helping me build the analytical and ethical foundation required of a financial planning professional.

Earning the CFP® certification has enhanced my confidence, credibility, and preparedness to serve clients with a holistic approach. I sincerely thank FPSB India for offering a globally recognized certification that equips aspiring financial planners with the knowledge and professionalism needed to make a meaningful difference in people's financial lives".

★★★★★

GAURAV SINGH, CFP®

Private Investor
Capital Markets

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