INDIA FINANCIAL PLANNING SUMMIT 2026

FPSB INDIA | CFP®

India's premier event for the Financial Planning Community.

November 18, 2026 *The Westin, Goregaon, Mumbai*



TIMINGS	AGENDA	SPEAKERS
08:30 AM to 09:15 AM	Registration of Attendees + Networking	
09:15 AM to 09:45 AM	Lamp Lighting, National Anthem, Welcome Speech	Ramesh Vishwanathan *Whole Time Director and Chief Executive Officer FPSB India*
09:45 AM to 10:15 AM	Chief Guest Address	Sivasubramanian Ramann *Chairperson, PFRDA*
10:15 AM to 10:45 AM	Keynote Address	G Ram Mohan Rao *Executive Director, SEBI*
10:45 AM to 11:15 AM	Guest of Honour Address	Nilesh Shah *Group President & MD, KOTAK AMC*
11:15 AM to 11:45 AM	Networking Break	
11:45 AM to 12:30 PM	**Expert Session 1:** Vision 2030: India's Growth Engine in a Turbulent World	Suvodeep Rakshit *Chief Economist, Kotak Institutional Securities*
12:30 PM to 01:30 PM	**Panel Discussion 1:** India Growth Story: Rise of a Billion Plus Aspirations	**Moderator:** Arun Thukral, CFP® *Prof. of Practice, K J Somaiya Institute of Management* **Panelists:** Aashish Somaiyaa *CEO, WhiteOak Capital AMC* Vishal Kapoor *CEO, Bandhan AMC* Ganesh Mohan *MD, Bajaj AMC*
01:30 PM to 02:15 PM	Lunch Break	
02:15 PM to 03:00 PM	**Panel Discussion 2:** Her Wealth. Her Voice. Her Vision. Women leaders shaping the future of financial planning	**Moderator:** Teena Rawal *Director Partnerships, FPSB India* **Panelists:** Madhu Lunawat *Founder, The Wealth Company* Cap. (Retd.) Yashika Hatwal Tyagi Renu Maheshwari *CEO & Principal Advisor, Finscholarz* Poonam Jain, CA *Co-Founder & Chief Financial Officer Simandhar Education*
03:00 PM to 04:00 PM	**Panel Discussion 3:** New-Age Investing: India's Evolving Wealth & Asset Allocation Landscape	**Moderator:** Pankaj Mathpal, CFP® *MD & CEO, Optima Money* **Panelists:** Onkarpreet Singh Jutla *CIO, Nuvama Private* Krishna Sanghavi *CIO, Mahindra Manulife Mutual Fund* Ajay Khandelwal *Head - Equity, Motilal Oswal Mutual Fund* Rahul Bhuskute *CIO - Bharti AXA Life Insurance*
04:00 PM to 04:30 PM	Networking Break	
04:30 PM to 05:30 PM	**Expert Session 2:** Role of AI in Financial Planning	Ganesh More, CA *Vice President - Miles Education*
05:30 PM to 06:00 PM	Closing Ceremony & Vote of Thanks	