

CFP® professionals CONNECT

(Newsletter Vol. 1- September 2023 Edition)

"Welcome to our Newsletter! It's an exciting moment for us as we embark on this journey of sharing insights, updates, and stories with you. As we take our initial steps into the world of newsletters, we are reminded of the power of communication in fostering connections.

In today's rapidly changing financial landscape, the importance of financial planning and literacy cannot be overstated.

Through this newsletter, we are not only offering you a glimpse into our aspirations, accomplishments, and the exceptional individuals who shape our organization, but we are also committed to shedding light on the world of finance. We believe that by weaving together a rich fabric of knowledge, novelty, and motivation, we can help you navigate the complexities of finance with confidence.

Your presence enriches our narrative, and for that, we extend our heartfelt gratitude. Thank you for being part of our story."

- FPSB INDIA TEAM

Welcome to the CFP® professional connect Newsletter September 2023 edition. It gives me a great pleasure and honor to bring this wonderful document in front of you.

As many of you now know, I have taken over as the CEO of FPSB India effective 01 August. I am thankful to FPSB Ltd and FPSB India for this opportunity, and I am excited about the prospect of further growing this strong global brand in India. FPSB brand is synonymous with quality, and it is an absolute honor to take forward the brand's legacy in India.

This newsletter will showcase several new initiatives, activities, and developments in the field of financial planning in India. As we know that the world is changing so do our profession and initiatives we take to connect with our customers and organizations. We will come up with this newsletter on a monthly basis to share all the efforts and development which are being done by FPSB India team and our CFP professional members across the country as well as globally.

You will see some of our brand bloom with some amazing expert content, a new name for our newsletter and some fresh looks across the social media handles of FPSB India. Our members, students and employees as well as those interested can now find helpful hints and insights into finance and financial planning world.

I am proud to announce that FPSB India will be celebrating the World Financial Planning Day on 4th October and we have lined up a series of activities and initiatives for all of us. We are looking forward to your participation and support in this regard. Please remember that this is a very small and significant step towards engaging our CFP members and we look forward to your contributions for the same in times to come.

Best wishes
Krishan



**Message from the CEO
- Krishan Mishra**

CFP CERTIFICATION PROGRAM UPDATES

Registered trademark symbol now applies to CFP® mark in India

We are pleased to advise that the CFP mark in India is now listed as a Registered Trademark. This means that ® (registered symbol in superscript) can now be used any time you use the CFP mark, in place of the use of CM.

01





Empowering Financial Planning: FPSB India's Discussion with Mr. Deepak Mohanty, Chairman of PFRDA

FPSB India had the privilege of engaging with Mr. Deepak Mohanty, Chairman of PFRDA. We explored the essential elements of well-informed financial planning and the need of financial empowerment, with a particular focus on the frequently underestimated domain of retirement.

New Authorized Education Provider Onboard!

In a significant pace towards fostering excellence in personal finance, FPSB India warmly welcomes its latest authorized education provider, Fintram Global, based in Delhi. With a proven track record in offering ACCA and CPA qualifications, Fintram Global is now poised to venture in the domain of financial planning with FPSB India. We eagerly anticipate the contributions of Fintram Global in shaping the future CFP® professionals in India.



Exploring Collaborative Opportunities with FPSB India – CPAC Members

Our recent discussion with Mr. Arun Thukral, CFP, CPAC Chairman and Professor in Practice at KJ Somaiya Institute of Management, Mumbai on a potential collaboration left us excited about the prospect of empowering students in the field of personal finance through the CFP certification. Looking forward to further action steps.

Followed by a very insightful and prospective collaboration with Mr. Naresh Pachisia, CFP and Founder MD of SKP Securities Ltd. over the crucial course of action on key areas of employability and entrepreneurial opportunities for prospective CFP Candidates in India.



Interactive Session with the students of MSc Finance and Analytics Program at Christ University, Delhi NCR in collaboration with Mr. Pankaj Dhingra, Co-Founder and Director of Fintram Global

We extend our best wishes and remain committed to empowering the next generation of finance enthusiasts, emphasizing the significance of personal finance as a pressing need for our highly driven youth in the country, as they journey toward financial independence.



05

Record-Breaking Participation in FPSB India's Integrated Financial Planning Exam in August

FPSB India, recently witnessed an extraordinary turnout of candidates appearing for the prestigious Integrated Financial Planning Exam. The numbers speak for themselves, with a staggering 190 candidates participating in this exam, setting a new benchmark for the organization!



06

Journal Release- July 2023

Explore our July 2023 Edition of FPSB India Journal. Opportunity to earn 4 CPD Credits! india.fpsb.org/cpd/



07

Simplified Payments: Transitioning to INR for Seamless Transactions!

Here is a significant update that will streamline your payment experience. In our ongoing effort to enhance convenience and cater to our valued members, FPSB India is transitioning its payment gateway from USD to INR for all transactions. Whether it's membership renewals, course registrations, or any other payments, you can now engage seamlessly with INR as your preferred currency!



08

Spotlight News: Stories Shaping Our Community

Stay informed and engaged as we delve into topics that matter, share exciting developments, and offer a glimpse into the pulse of our organization. From industry trends to member spotlights, our news column is your go-to source for staying connected and informed. **Let's dive in!**

[Outlook Money Magazine](#)



[Indian Express Article](#)



[News9 Article](#)



[HansIndia Article](#)



[Times Of India Article](#)



[Hindustan Times Article](#)



[Business Today Article](#)

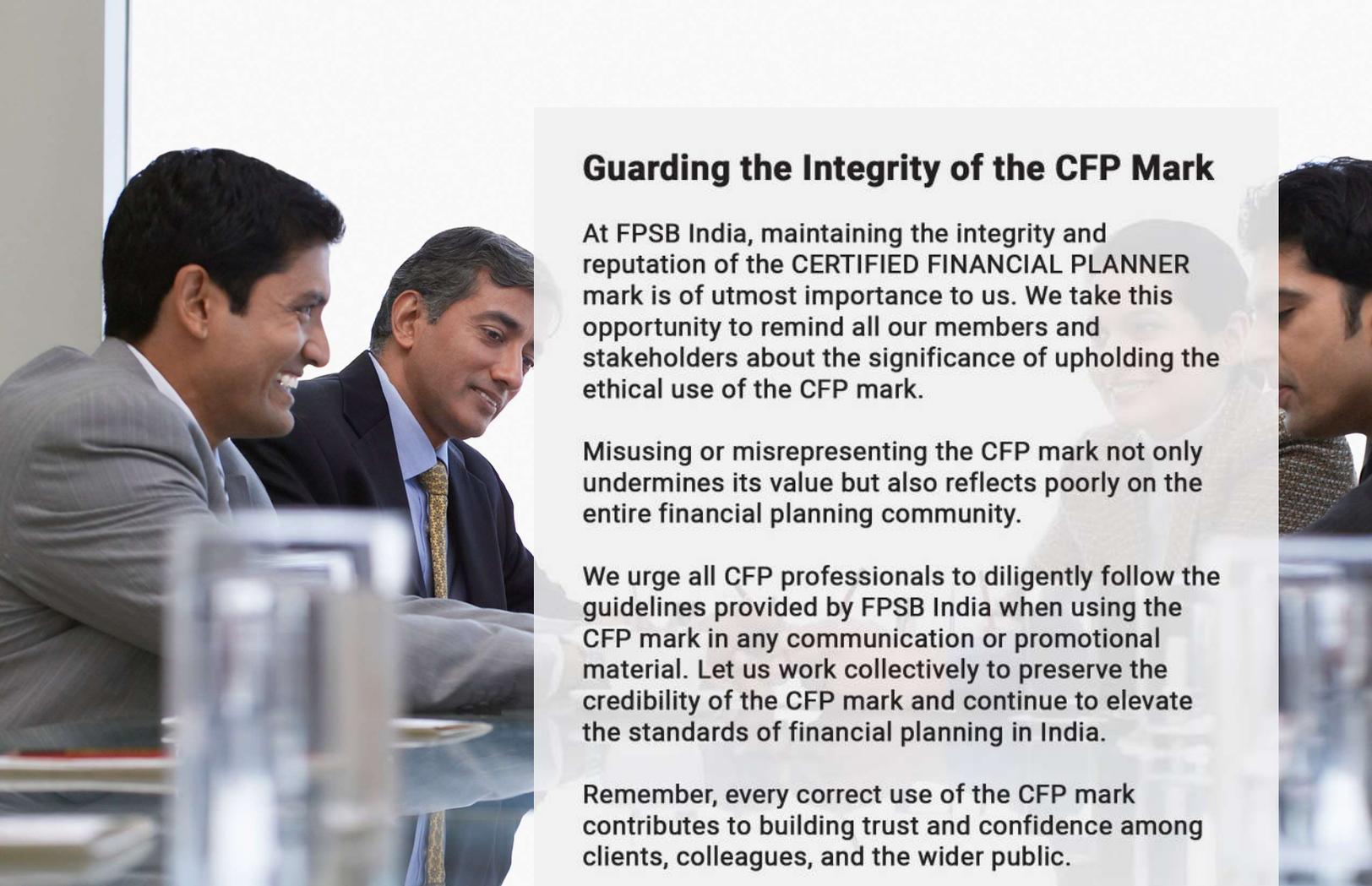


WORLD
FINANCIAL
PLANNING
DAY HOSTED BY FPSB

World Financial Planning Day – 4th Oct 2023

Mark your Calendars! We are excited to announce that the 7th Annual World Financial Planning Day will be held on 4th October, 2023. Learn more about this year's World Financial Planning Day [🔗](#)

#CFP #FPSBIndia #financialplanning #WFPD2023 #IOSCOWIW2023



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 mark and continue to elevate the standards of financial planning in India.

Remember, every correct use of the CFP mark contributes to building trust and confidence among clients, colleagues, and the wider public.

Thank you for your unwavering commitment to maintain the integrity of the CFP mark.

 [Marks Use Guidelines](#)

Follow Us On Our Social Media Handles

