

CFP® professionals CONNECT

(Newsletter Vol. 4 - December 2023 Edition)

"Welcome to the 4th edition of FPSB India's newsletter for December 2023. Brace yourselves for an abundance of exciting updates and noteworthy achievements.

In this edition, we highlight our strategic collaborations with HDFC AMC, IIBF, and Star Union Dai-ichi Insurance, reinforcing our commitment to shaping the future of financial planning by generating more employment opportunities.

Catch a glimpse of our Diwali celebrations, adding a touch of joy and camaraderie to our workplace. Don't miss the updates on Krishan Mishra's participation in the FAAA Congress 2023, bringing together the best minds in the financial sector along. Explore new opportunities on our job board and stay informed with our spotlight news column.

Dive into the exciting content at this end of the year edition, and here's to a prosperous and fulfilling 2024!"

-- FPSB India Team



Message from the CEO
-- Krishan Mishra

Dear CFP® Professionals,

Welcome back to our CFP® Professionals CONNECT Newsletter!

I am thrilled to reconnect with you as we delve into another edition packed with exciting updates, insightful content, and noteworthy achievements.

As we navigate the new year together, we find ourselves reflecting on the journey so far and the strides we've taken together.

In this edition, we have curated a diverse range of updates, features, and announcements that we believe will captivate your interest and provide valuable insights. From job creation with top organisations to the Diwali celebrations, there's something for everyone. We're also delighted to share some behind-the-scenes glimpses and success stories that underscore the incredible work being done by our FPSB India team.

I also had the opportunity to represent you at the FAAA Congress which was organised by our peer Financial Advice Association of Australia at Adelaide. We are bringing some exciting news from Australia for you which I will be sharing separately in the future edition with you all.

Your ongoing support has been the cornerstone of our progress, and we're grateful for the trust and enthusiasm you've placed in us. As we move forward, we remain committed to delivering content that informs, inspires, and adds value to your experience with us.

Thank you for being an integral part of our community. Without further ado, let's dive into the latest from FPSB India and explore the exciting developments that await!

CFP® CERTIFICATION PROGRAM UPDATES

FPSB India Explores Promising Partnership with HDFC AMC!

Our recent meeting with HDFC AMC's Head of HR, Mr. Alok Sheopurkar. Exploring exciting collaboration opportunities, we are delighted to share that they will soon be onboarded. Additionally, they have kickstarted the partnership by sharing 17 job requirements across India, offering competitive salaries. Check out our [Job Board!](#)

1



2

Strengthening Ties: FPSB India's Productive Meeting with Indian Institute of Banking and Finance (IIBF)

In a highly effective meeting held in November, FPSB India engaged in fruitful discussions with IIBF, reinstating our collaboration.

Interesting developments unfolded as we agreed on multiple avenues for working closely together. Stay tuned for the upcoming synergies!

FPSB India's Collaborative Endeavor with Star Union Dai-ichi Insurance

A fruitful encounter took place as FPSB India engaged with Mr. Gopal Krishnan, Head of Strategy and Digital Initiatives at Star Union Dai-ichi Insurance—a joint venture between Bank of India, Union Bank, and Dai-ichi Japan. Exciting times lie ahead as we embark on collaborative efforts, continuing to spanning employability enhancement to upskilling initiatives. Such endeavors align with our commitment to enhancing the employability of CFP certification in the coming years.

3



4

In the Spotlight: Teena Rawal's Role in the Financial Planning Dialogue

Teena Rawal, our Regional Head for West and North India, recently participated as a panelist at a session hosted by K J Somaiya Institute of Management in Mumbai.

The discussion, featuring esteemed panelists Mr. Pradeep Agarwal, Sr. Vice President -II & Regional Head Branch Banking Operations, Axis Bank and Mr. Rishi Nathany, Chief Business Officer, Multi Commodity Exchange of India Ltd. (MCX), centered around "Financial Planning and its Importance: Future Trends Unveiled."



Teena's insightful contributions added significant value, showcasing our commitment to shaping the future of financial planning.

Connecting Opportunities: Rajesh Singh Briefs COFP on FPSB India's Initiatives

Our Sr. Manager of Business Development for the South, Rajesh Singh, recently participated in the Council of Financial Planner (COFP) monthly meeting held in Bengaluru.

During the session, he provided insights into FPSB India's ongoing activities and job opportunities. Rajesh encouraged collaboration by requesting attendees to promote and share these employment opportunities within their networks. This collaborative effort plays a crucial role in expanding our reach and fostering a vibrant professional community.

5



6

Elevating Standards: FPSB India's Newest Authorised Education Provider (AEP), ArivuPro to Offer Integrated CFP Certification

FPSB India proudly announces ArivuPro as its newest authorized education provider and has formalized an agreement with Mr. Arjun Varadraj, Founder and CEO of ArivuPro.

It specializes in professional exam tutoring and offers integrated courses in collaboration with institutions nationwide.

7



Diwali Celebrations Spark Joy at FPSB India!

This Diwali, FPSB India embraced the spirit of joy and togetherness with a vibrant celebration filled with games and fun activities. Our team came together to share laughter, play games, and strengthen the bonds that make our workplace a wonderful place to be.

 [Discover Opportunities on Our Job Board!](#)

GREAT NEWS!!!

We have fantastic new job opportunities waiting for you on our JOB BOARD.

Don't miss out—visit today and apply for your next career move. Your future awaits!





FAAA Congress 2023: FPSB India Explores New Horizons

Krishan Mishra, CEO of FPSB India, recently attended the Financial Advice Association Australia (FAAA) Congress 2023—a remarkable event that gathered some of the brightest minds in the financial sector.

The FAAA Congress 2023 served as a vibrant hub for collaboration, uniting financial experts and emerging talents. Each session provided invaluable insights and tools crucial for navigating today's dynamic financial landscape. The significance of networking emphasized the importance of a cohesive financial community.

A sincere thank you to the FAAA for organizing such an impactful event. This experience has equipped our team with valuable knowledge and perspectives, furthering our commitment to elevating financial planning standards in India and collaborating closely with our Australian counterpart, FAAA.



SPOTLIGHT NEWS! : Stories Shaping Our Community

Stay connected and informed with our news column, where we explore vital topics, share exciting updates, and give you an inside look at our organization's heartbeat. Dive in now!



[Business Today Article : Krishan Mishra](#)



[Economics Times Article](#)



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[Day 3 of the Financial Mastery Series with FPSB India: Risk Management - LinkedIn](#)



[Day 4 of the Financial Mastery Series with FPSB India: Tax Planning - LinkedIn](#)



[Day 5 of the Financial Mastery Series with FPSB India: Estate Planning - LinkedIn](#)



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.

 [For Marks Use Guidelines](#)

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Merry
Christmas
&
Happy New Year !

May your holidays be merry and bright. As you welcome the New Year, consider reviewing your budget for a financially sound 2024 ahead!

-- FPSB India Team