

# CFP® professionals CONNECT

(Newsletter Vol. 5 - January 2024 Edition)

As we step into a brand-new year filled with possibilities and opportunities, it brings us immense pleasure to extend a warm welcome to each one of you to the 5th edition of FPSB India's newsletter - CFP Professionals CONNECT.

We have successfully shaped this platform to bring you the latest updates, insights, and valuable resources that will empower you in your journey as Certified Financial Planner®.

In this edition, we have curated content to kickstart your year on a positive and informed note. We aim to provide you with a diverse range of articles that cater to your professional growth and development along with various other initiatives undertaken by us to compliment our dear CFP professionals.

Remember, CFP Professionals CONNECT is not just a newsletter; it's a community. A community of dedicated and passionate individuals committed to excellence in financial planning. Thank you for being an integral part of FPSB India, and we look forward to an exciting year ahead filled with learning, collaboration, and success.

Wishing you a prosperous and fulfilling 2024!

-- FPSB India Team

Dear CFP® Professionals Family,

As we step into the dawn of 2024, I am delighted to extend my warmest greetings to each one of you. The past year has been a testament to our collective resilience and adaptability in the face of unprecedented challenges. Together, we have not only weathered storms but also emerged stronger, more united, and with a renewed sense of purpose.

In 2023, FPSB India achieved remarkable milestones, thanks to the relentless efforts of our talented team and the unwavering support of our valued CFP professionals and partners. Our commitment to innovation, customer satisfaction, and sustainable practices has paved the way for success, and I am immensely proud of what we have accomplished.

Looking ahead, 2024 promises to be a year of even greater opportunities and growth. As we navigate the evolving landscape of our industry, we will continue to prioritize innovation, pushing the boundaries of what is possible. Our entire team is already working hard on groundbreaking projects that will not only meet but exceed the expectations of our student and CFP professionals' family.

Furthermore, we are dedicated to fostering a workplace culture that encourages creativity, collaboration, and inclusivity. Our people are at the heart of our success, and their passion and dedication drive our achievements. We will continue to invest in professional development programs, mentorship initiatives, and employee well-being to ensure that FPSB India remains a great place to work.

Last month has been pivotal in terms we signed a Memorandum of Understanding with our partner organisations like ARIA (Association of Registered Investment Advisors), Chitkara University Chandigarh, Indian Institute of Banking (IIBF) and finance and VG Learning Destination.

Lastly, I want to express my sincere gratitude to each one of you, whose trust and loyalty inspire us to reach new heights.

Thank you for being an integral part of the FPSB India journey. Together, let us make 2024 a year of innovation, growth, and shared success.

Wishing you all a prosperous and fulfilling year ahead.



Message from the CEO  
-- Krishan Mishra



## Building Alliances: FPSB India Strengthens Bonds with New MoUs!

FPSB India recently solidified its collaborative efforts by signing Memoranda of Understanding (MoUs) with esteemed partner organizations. These partnerships signify a commitment to excellence, innovation, and shared goals in the realm of finance and education.

### INDIAN INSTITUTE OF BANKING AND FINANCE (IIBF)

Unveiling a groundbreaking collaboration with the MoU signed between FPSB India and the Indian Institute of Banking and Finance (IIBF). This partnership opens a direct pathway for CAIIB professionals to accelerate their journey towards CFP® certification.

According to Mr. Krishan Mishra, CEO, FPSB India, this partnership marks a pivotal moment, fostering professionalism and recognizing skilled individuals. **Mr. Biswa Ketan Das, CEO of IIBF**, echoes this sentiment, emphasizing their joint commitment to excellence in banking and finance education.



### ASSOCIATION OF REGISTERED INVESTMENT ADVISORS (ARIA)

Furthermore, FPSB India is thrilled to announce another strategic MoU with ARIA (Association of Registered Investment Advisors). This collaboration aims to boost the visibility and significance of the financial planning profession, emphasizing the critical role of professional advisory services.

A heartfelt thank you to **Mr. Vivek Rege, Chairman, ARIA** and **Mr. Tarun Birani, Vice-Chairman, ARIA** for their exceptional support in making this partnership possible! Stay tuned for collaborative initiatives in promoting financial planning profession in India.



### CHITKARA BUSINESS SCHOOL, CHITKARA UNIVERSITY, CHANDIGARH

FPSB India finalized a noteworthy MoU with Chitkara Business School, Chitkara University. This collaboration seamlessly combines academic prowess with professional growth, enabling MBA Finance students to concurrently pursue CFP certification with their degrees.

The MoU, formally executed by Mr. Krishan Mishra, CEO, FPSB India, and **Dr. Sandhir Sharma, Pro Vice-Chancellor of Chitkara Business School**, is centered around collaborative efforts in teaching and curriculum development for finance courses at both postgraduate and undergraduate levels. Anticipate exciting prospects for transformative education!





# CFP® CERTIFICATION PROGRAM UPDATES

## A Major Leap Forward: FPSB India Inks Deal with VG Learning Destination (VGLD) as its new Authorised Education Provider

FPSB India proudly announces the successful MoU agreement with **VG Learning Destination**, marking a major milestone. Their addition to our network of education providers is a step forward in ensuring that professionals in the financial planning domain have access to top-tier educational resources and training.

A sincere acknowledgment to **CA Vinod Gupta, the Founder & Director of VGLD** and his team for engaging in insightful discussions regarding the initiation of the CFP® certification program.



## FPSB India Team Engages in an Enlightening Discourse with Mr. Rajesh Krishnamoorthy

FPSB India Team is elated to recount a recent rendezvous with the **Mr. Rajesh Krishnamurthy, Independent Director, PGIM Mutual Fund**. His generous sharing of profound insights into the CFP certification program, drawn from his extensive experience, was truly invaluable.

## Strategic Dialogues: FPSB India Explores Collaboration with ISB, Mohali

In a recent meeting with the Indian School of Business (ISB), Mohali, FPSB engaged in meaningful discussions with **Col. Rajiv Bhargava, Senior Associate Director at ISB**. Delving into the course of the meeting, both entities explored strategic avenues for partnership to amplify awareness regarding the significance of financial planning through the esteemed CFP certification.



## Shaping Finance Futures: Krishan Mishra Guides Students at Chitkara Conclave

Krishan Mishra, CEO FPSB India, shared his thoughts on a panel discussion at Chitkara University, Chandigarh on the topic, "**Featuring Future of Finance in New Bharat**". Alongside esteemed panelists, Krishan shared profound insights, contributing to students' in-depth understanding of the dynamic financial landscape. The conclave, focusing on knowledge exchange and collaborative discussions, provided students with a roadmap for navigating the complexities of the evolving finance industry.



**Innovation in Training: FPSB India and QX Global Align for CFP Professional Development**

FPSB India Team engaged in a productive meeting with **Sagar Ahuja, CEO of QX Global**. The discussion revolved around fostering opportunities for CFP professionals and developing tailored training programs for their existing staff.

This strategic collaboration aims to further enrich the financial planning landscape and elevate professional standards within the industry.



5



6

**Enriching Talents: FPSB India's explores Collaborative Endeavor with Axis Bank for CFP Certification**

In a forward-looking session, FPSB India recently conducted a constructive meeting with Axis Bank, delving into operational challenges for initiating the CFP certification course for their employees.

The dialogue extended to providing support in talent acquisition and upskilling existing staff, emphasizing a collaborative effort to enhance financial planning expertise within Axis Bank.

**Pioneering Excellence: FPSB India and B S Jolly, CFP share plans to elevate financial planning standards**

FPSB India Team, led by CEO Mr. Krishan Mishra, participated in a community meeting organized by our authorized education provider IIFC, Chandigarh, at Wyndham Hotel Mohali. The event featured insightful discussions with recently qualified CFP professionals sharing their journey and highlighting how this skill set is propelling them towards their career aspirations, fostering a collaborative atmosphere for learning and growth



7



8

**GCEC**



**AIMT**



**ICOFP**

**FPSB INDIA IN ACTION! Business Development Team Sparks Enthusiasm**

FPSB India's Business Development Team is on the move, actively engaging with stakeholders! They recently participated in the commerceclave event at Global Centre for Entrepreneurship and Commerce (GCEC) in Jaipur, conducting insightful sessions on the CFP certification program for over 80 students. Productive meetings with promising partner, the Army Institute of Management (AIMT) and International College of Financial Planning (ICOFP), Delhi further highlighted our commitment to forging impactful collaborations and supporting the future of financial planning education.



9



## Elevating Awareness: Mindful engagement with Livemint Editor Neil Borate on the future of CFP Certification Program in India

FPSB India Team recently held a constructive meeting with **Neil Borate**, Editor of Personal Finance at Livemint.

Engaging in discussions, we outlined FPSB India's impactful initiatives for the CFP certification program in India. This collaboration underscores a shared commitment to fostering excellence and awareness in the realm of personal finance.

## Celebrating Success: FPSB India Announces Impressive Results for December'23 Exams

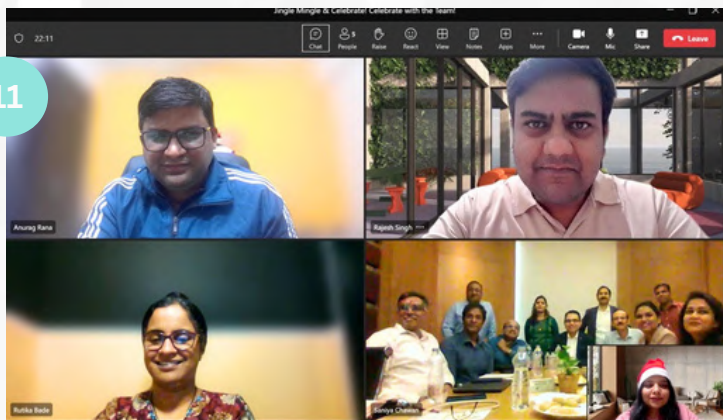
In the December'23 examination cycle, FPSB India celebrates the success of **72 candidates** who passed the CFP® Final exam, alongside 96 candidates excelling in other Specialist Exams. Moreover, over 110 candidates have submitted their Financial Plan Assessments, currently progressing through the evaluation process.

This marks a promising stride in advancing financial planning excellence. Congratulations to all our dedicated candidates!

10



11



## Festive Reflections and Forward Plans: FPSB India's Year-End Celebration

Embracing the festive spirit, FPSB India recently held a vibrant celebration, reflecting on the achievements and learnings of 2023. The gathering served as a strategic planning session for the upcoming year, where shared goals were defined to propel the CFP certification program in India.



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Explore incredible career opportunities now available on our JOB BOARD. Check out the latest job openings and seize the chance to make your next career move.

- GYR Financial Planners Private Limited
- HDFC Asset Management Co Ltd.
- Dilzer Consultants Pvt Ltd
- Guardian Capital Investment Advisors Pvt. Ltd.
- Kedia Capital Services Private Limited
- Nexus Financial Services WLL
- FINTOO

**Don't miss the opportunity – your future journey begins here!**



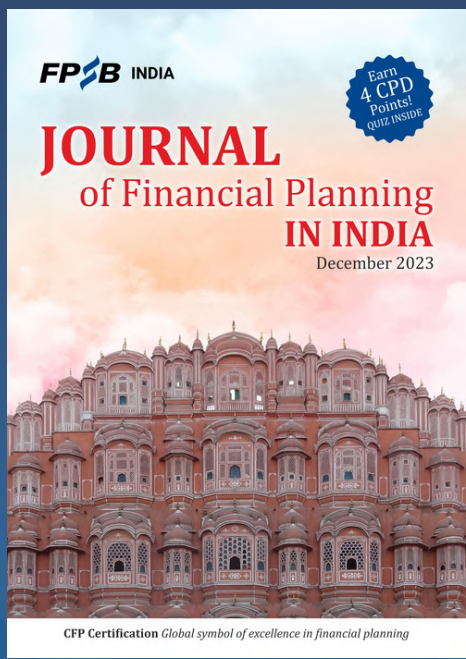
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PRESENTS



Join us at JIO Convention  
Centre, Mumbai!  
Date: 23rd -24th January 2024

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## ABOUT THE EVENT

Outlook Money 40After40 is a part of a new Retirement Platform, which aims to disseminate information and strategies related to this important life goal. The event is an extension of Outlook Money's drive towards spreading awareness and creating conversations around the important but often-ignored need for retirement planning, making it the only media house with a dedicated website on editorial content around retirement. It aims to provide invaluable insights and expert guidance to individuals, helping them make informed decisions to secure a prosperous retirement.

40AFTER40 promises to generate debates and discussions, host masterclasses and workshops, and suggest holistic solutions on retirement to the attendees. It aims to straddle across several retirement-related issues, from financial planning to wellness, living options to travel, life after retirement, and more. The event will see the presence of representatives from the Government, policy makers, CEOs and MDs from the BFSI sector, Health & Wellness, Sports and Art & Cinema.

The event will feature over 10 Thought Forums held in the following formats-

- Exclusive Keynotes by Policy makers and Celebrities
- Plenary Sessions by Industry leaders
- BSFI Sectoral Seminars



Embark on a knowledge  
odyssey with  
**Mr. Krishan Mishra,**  
CEO of FPSB India,  
at the  
Plenary Discussion, titled  
**‘THE LAST MILESTONE’**

Date: 23rd January, 2024  
Time: 3:00 PM

Don't miss your chance to be  
part of this enriching dialogue  
shaping the future of financial  
planning!



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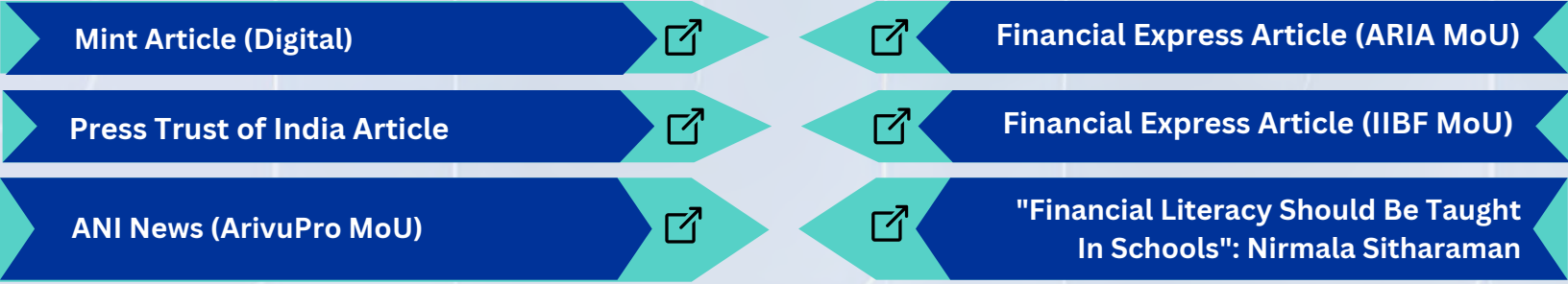
MINT



THE INDIAN EXPRESS (PRINT)



MICROSOFT NEWS



### 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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