

FPSB India conclave charts new pathways for financial planning professionals

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Hyderabad: FPSB India, the Indian subsidiary of Financial Planning Standards Board Ltd., organised a day-long dialogue titled “Shaping Tomorrow: Building Practice Growth and Entrepreneurial Pathways for Certified Financial Planning® Professionals” here on Monday. The conclave brought together CFP® professionals, industry leaders, educators, and practitioners from across India’s financial services ecosystem to deliberate on emerging opportunities in financial planning and entrepreneurship.

The event featured interactive workshops, case studies, fireside chats, and panel discussions designed to foster dialogue on skill development, ethics, compliance, and client-centric innovation. The sessions highlighted the evolving role of financial planners in guiding households and businesses toward informed, goal-oriented financial decisions.

Opening the conclave, Dante De Gori, CEO of FPSB International, emphasised India’s growing leadership in financial planning. “India is rapidly emerging as a hub of financial planning talent and innovation. By encouraging professionals to explore new pathways for practice growth and entrepreneurship, FPSB India is contributing to the broader goal of developing a strong, trusted community of financial planners who can serve clients with excellence and integrity,” he said.

The keynote address was delivered by A Balasubramanian, Managing Director & CEO of Aditya Birla Sun Life Mutual Fund, who spoke on “Rising Bharat: Charting a Bold Economic Future.” He highlighted India’s defining economic moment, marked by stability, reforms, and long-term growth prospects. Balasubramanian noted the steady compounding of household wealth and the shift in investor behaviour from traditional savings to diversified investments, underscoring the importance of financial planning in empowering individuals.

Workshops through the day included sessions by B Srinivasan on practice ethics, Vishal Dhawan on regulatory frameworks, and Dr Vaibhav S Joshi on fintech convergence. A panel on “Integrating Health and Financial Well-being” featured experts including Arun Thukral, Preeti D’Silva, Hemendra Kumar Singh, Akhil Chaturvedi CFP®, and Nisha Sanghavi CFP®, who discussed holistic approaches to client welfare.

Chandrakant Sureka, Interim CEO of FPSB India, reaffirmed the organisation’s commitment to strengthening professional capabilities and aligning practices with global standards.

“We continue to encourage financial professionals to combine technical expertise with ethical integrity and client empathy,” he said. The conclave concluded with the FPSB India Awards and New Certificant Ceremony 2025, recognising excellence among students, educators, and professionals, while welcoming new CFP® certificants into the global community.