



FPI NEWS

15 December 2009

Dear Member

1. Exciting New Website Developments and Member Benefits in 2010!

From 2010, the following will be advertised on the FPI website:

1. Financial planning career and experience opportunities.
2. Industry events via an industry calendar.
3. Industry legal and technical practice notes.
4. Financial planning products, tools and services.
5. Financial planning literature/reading material.

In addition, FPI has negotiated with LexisNexis for our members to subscribe free of charge to the online legislative research tool in 2010. The normal subscription cost for this service is R1 950.00 p.a. As of March 2010, all FPI members will have free access to the customised online information portal containing selected Acts and Regulations (including amendments) as well as free access to Current Awareness which is an email alert service.

Watch this space for further information!

2. CPD Reporting Cycle

The 2-year CPD points reporting cycle ends on 31 December 2009. Members have until **28 February 2010** to ensure that all their CPD points are uploaded on the website or submitted to us via the Registers. Click here to download the CPD Register and Professional Reading Register.

This is to be returned to us by email at membership@fpimail.co.za or fax 086 632 8160 / 086 637 7980 / 086 580 1017. Alternatively, please contact Front Line Services on 086 1000 374 should you require any further information or assistance.

3. 2010 Fees & Renewals

From 2010, members will be required to submit the following to renew their annual membership and certification:

1. Certification Renewal Form.
2. CPD Register and Professional Reading Register.
3. Payment of the annual membership and certification fee.

[Click here](#) to access the fees and forms for 2010. These forms are to be returned to us on the contact details in section 2 above.

Members are also able to renew their membership and make payment online by logging onto the FPI website using their Username & Password.

Invoices will be sent to members in January 2010..

4. Financial Planning Week & World Financial Planning Day

FPSB affiliate countries across the globe will be participating in the "World Financial Planning Day" initiative planned for April 2010. The FPI will also be arranging the first ever Financial Planning Week at the same time to raise awareness of financial planning amongst stakeholders and consumers.

Watch this space for further information and opportunities to participate in and support this initiative, a first in the financial services industry!

5. FPI 2010 Annual Convention "Beyond the Recession"

The 2010 Convention registrations have opened and we will once again have an excellent line up of speakers. Members earn 14 C PD points for attending.

If you are travelling, we recommend that you book your flights early to avoid possible higher costs leading up to the Soccer World Cup. Accommodation rates have already been secured through the Peermont Group at a group booking rate. Please visit the convention website at www.fpicongvention.co.za.

Make sure you attend the biggest annual financial services industry event in 2010!

6. RFP Old Examinations

The National Certificate: Financial Services: Wealth Management (SAQA ID: 23973) has expired and the last date for achievement is 13 August 2010. The last opportunity for learners to write the RFP2 and RFP3 Old Examinations was in July and October this year.

Due to the demand, for those learners who have only partially completed the qualification, we will be offering them the opportunity to write the RFP Old 1, 2 and 3 examinations in 2010, thereby giving them the chance to complete the full qualification. These examinations will be held in March and July 2010. Learners can register via the website once the exam registrations are opened next year.

This will be learners' last opportunity to obtain the full qualification before the qualification expires and ensure that they meet any possible future changes to the competency requirements.

7. The Magazine – The Financial Planner

The magazine continues to receive many great reviews. A recent comment received from a CFP[®] professional member was:

"I have been in the Industry for about 20 years now. Quite recently one of the "old guard" and I had a discussion about the Financial Services Publications and we concluded that the Financial Planner is THE Publication of note in our times. I believe that the articles are well researched, informative and constructive. Most of it adds tremendous value to ones practice. I am honoured to be associated with the FPI and the Financial Planner."

Should you wish to contribute articles, please contact Tony van Niekerk at tony@cover.co.za or Kim Forbes at kim@cover.co.za.

8. FPI/Personal Finance Financial Planner of the Year Competition

Ever considered the exposure you would receive by being named as the FPI/Personal Finance Financial Planner of the Year?

The FPI would like to encourage members to enter in order to highlight the quality of financial planners working in South Africa. In addition, from 2010, should the winner be a CFP[®] professional, they will become the Brand Ambassador for the CFP[®] mark and FPI. **So enter now, entries close 08 January 2010! [Click here](#) to download an Entry Form.**

For further information, please contact Batwa Mzamane on batwa@fpimail.co.za or Front Line Services on 086 1000 374.

9. Regulation of Financial Planning

An FPSB Regulation Task Force was formed in 2009 to investigate the key principles and issues regarding the global regulation of financial planning. In support of this, the FPI Board of Directors appointed a Task Team to develop a discussion document for the regulation of financial planning in South Africa for submission to key stakeholders in 2010.

10. FSB Regulatory Exams

FPI together with Moonstone, IOB and SAIFM were appointed as Examining Bodies for the development and delivery of the new Regulatory Examinations. All Examining Bodies will be conducting trials and pilots for these examinations. Industry support will be required to source candidates in order to ensure that these processes are successful and that the examinations can be rolled out timeously in 2010.

Further information will be made available via the new dedicated FPI Examining Body website.

11. New NQF Level 7 Provider Partner appointed!

We are pleased to announce the appointment of **Milpark Business School** as a provider partner for the Post Graduate Diploma in Financial Planning from 2010. As part of the learning process, candidates will have access to the FPI Case Study which, if completed successfully together with the Diploma, allows the candidate to apply for CFP[®] certification and membership of the FPI.

This brings the number of provider partners at this level to 5 which includes **University of the Free State, University of Stellenbosch, University of Johannesburg** and **Nelson Mandela Metropolitan University**.

[Click here](#) to view the NQF Level 7 provider partners and links to their websites.

Best wishes

Your FPI Team