



Financial Planning
Institute of Southern Africa

THE PROFESSIONAL STANDARD

**2021
PROFESSIONAL
PRACTICE OF THE
YEAR ENTRY FORM**

NB: Please read the 2021 Professional Practice Guide before completing the entry form as this contains important information about the competition and process.

Professional Practice KI/responsible person

Personal details

Title: _____ Surname: _____

First name (s): _____

ID number: _____

Professional Designation (CFP® professional): _____

Membership Number: _____ Email: _____

Physical address: _____

_____ Postal code: _____

Telephone (W): _____ Cell: _____

I warrant that all information provided in this entry form is true and correct.

Signed at _____ on _____ 2021.

I, _____ hereby acknowledge the terms and conditions of the 2021 Professional Practice of the Year competition and undertake to adhere to them. By entering the competition, I consent to FPI conducting a full background and reference check on all Key Individuals and Representatives involved in the practice.

Accept

Practice Details

1. Company name: _____

2. Company's registration number: _____

3. Company's tax status: _____

4. Type of company and description of company activities:

5. Describe the ownership structure of the practice:

6. FSP license number: _____

7. License categories:



8. What services do you offer your clients (estate and trust planning, investment planning, risk planning, retirement planning, health care planning or tax planning)? Please feel free to add any additional comments/services below should the examples above be too restrictive:

9. How many clients does the practice have as at 31 December 2020 and what is the AUM (if any) that the practice is responsible for?

Clients: _____

AUM: _____

10. What outsourced agreements for services do you have in your practice?

11. Name any awards/achievements that the practice may have been awarded with over the last five (5) years?



Professional Involvement

1. Is the practice, or anyone in the practice a member of any FPI committee/s and if so, what is/was their involvement in the FPI over the last three (3) years?

2. Is the practice or anyone in the practice involved in any financial literacy education, charity fundraising initiatives or any other consumer or education activities? If so, please provide details:

3. Does the practice or anyone in the practice participate in the media to promote financial planning to consumers (articles, broadcast media)? If so, please provide details:

