



FPI

Financial Planning
Institute of Southern Africa

THE PROFESSIONAL STANDARD

*FPI
Corporate
Partner™*



FPI [™]
Corporate
Partner

www.fpi.co.za

Vision

Professional financial planning for all.

Our Mission

The FPI's mission is to advance and promote the pre-eminence and status of financial planning professionals, while at all times acting in the interests of the society (community, constituency) whom the profession serves, by:

1. Improving the quality and accessibility of professional financial planning for all in Southern Africa.
2. Acting as advocate for professional financial planning, building a recognition of the importance and need for such planning by the general public.
3. Providing a framework within which members can achieve qualifications and maintain competence to create greater value for their clients, practices and employers.
4. Ensuring that members maintain the highest ethical standards in the pursuance of their profession.
5. Providing a leadership role within financial services by providing balanced, credible input and commentary to government and the public.
6. Facilitating transformation within the profession.

Why become an **FPI Corporate Partner™?**

The *FPI Corporate Partner™* status was created in the interest of supporting organisations to distinguish themselves and also to demonstrate their level of commitment in maintaining the highest professional and ethical standards in the financial services industry

FPI invites you to take advantage of the co-branding opportunities afforded by being a *FPI Corporate Partner™*. Your business will be identified by consumers as a role model for financial planning in the industry.

- As the independent professional body for the financial planning industry we assist our *FPI Corporate Partner™* firms to achieve their business objective of raising the competency level of their planners and advisors. We do this by assisting you to align your training and development plans with the FPI pathway to CFP® certification.
- Your affiliation with the Institute demonstrates that you abide to the highest professional and ethical standards, bringing your organisation the recognition and respect it deserves.
- As an *FPI Corporate Partner™* your business will receive industry recognition - the use of *FPI Corporate Partner™* branding will clearly identify you as a financial services provider supporting professional standards.
- Your business will be listed as a *FPI Corporate Partner™* on the FPI website which attracts consumers seeking professional financial planning advice. They will know that your business subscribes to the highest ethical standards in the industry and that they will deal with financial planners and advisors who strive to exceed the requirements set by the regulator.
- Future and current employees will be attracted by your standing as an *FPI Corporate Partner™*
- FPI will partner with you in consumer awareness campaigns, giving your organisation positive exposure in the public space.



Why firms value CERTIFIED FINANCIAL PLANNER® professionals?

Global research from **Financial Planning Standards Board (FPSB)** by **Comparator Benchmarking**, a wealth management and financial advice-benchmarking organisation, displays the positive impact **CERTIFIED FINANCIAL PLANNER®** professionals have on South African financial firms and their consumers.



Research Participation Overview

Sector representation:

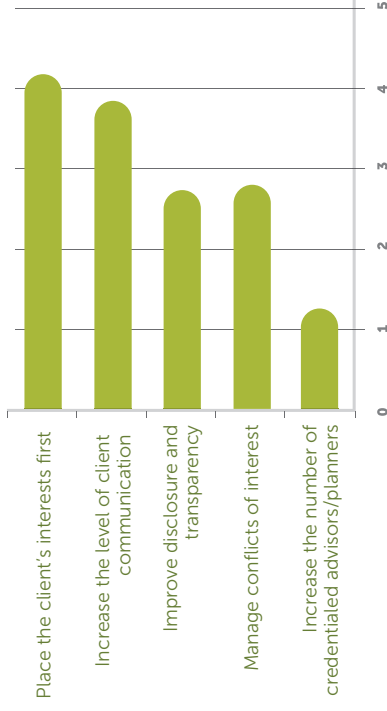


4 things firms value most about CERTIFIED FINANCIAL PLANNER® professionals?

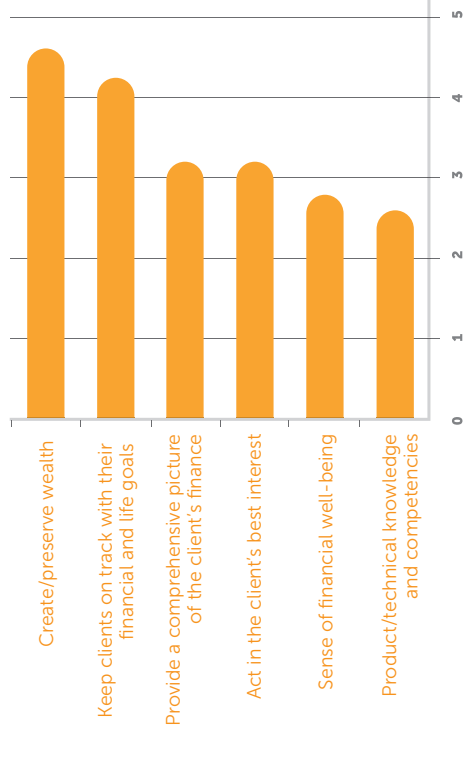
- 80%** of firms believe that they have a *higher rate of growth* of assets under management
- 80%** of firms believe that they generate a *higher revenue*
- 60%** of firms believe that they are *more productive*
- 80%** of firms believe that they generate a *higher profit*



5 things firms should do to improve consumer's trust:



When asked to rank **1-5** (with 5 being the highest and 1 the lowest), what firms think clients value from financial planners, the results were as follows:



CFP® professionals are more productive and profitable

- CFP® professionals are more productive, according to **60%** of firms surveyed
- 80%** of firms indicated that **CFP® professionals** (in general) generate higher levels of revenue than advisors without **CFP®** certification
- 60%** of firms saw an increase in business profitability from **CFP® professionals**, compared to those without **CFP®** certification



The CFP® certification's impact on financial planners' career progress

- 80%** of firms viewed **CFP®** accreditation as favourable when employing financial planners/advisors
- 80%** of firms believed that **CFP®** professionals have a higher rates of career advancement than those who do not hold the designation
- 80%** of firms believed that **80%** of **CFP®** professionals average longer terms of employment compared to advisors who do not hold **CFP®** certification

CFP® certification and public perception

In **12 months**, **60%** of firms expect an increase in the number of people seeking advice from financial planners.

In **5 years**, **60%** of firms expect an increase in the number of people seeking advice.



CFP® certification and risk avoidance

60% of firms indicate that **CFP®** professionals have lower compliance and legal risks compared to those who are not certified.



CFP® certification and client retention

- 80%** of firms indicated that employing **CFP®** professionals had a positive impact on clients satisfaction with the firm and led to increased client retention.
- 60%** of firms identified a growing demand for high net worth clients to be serviced by a **CFP®** professional.



FPI Corporate Partner™

value proposition

WHO MAY BECOME AN FPI CORPORATE PARTNER™?

Large institutions in the Financial Services Industry

BENEFITS

1. PATHWAY TO CERTIFICATION

Raising the competency level of your planners and advisors:

- by aligning your training and development plans with the pathway to CFP® certification and FSA™ certification.
- by offering all interface support staff the opportunity to become affiliated with the FPI and benefiting from ancillary membership benefits.

2. MENTORSHIP CENTRE

- FPI will assist with free mentorship training
- Assist you to combine/incorporate your internal services under supervision process as part of the mentorship programme
- Regular feedback on staff participating and progress in the mentorship programme

3. CONTINUOUS PROFESSIONAL DEVELOPMENT – CPD

- Your internal training department may become an FPI Approved CPD Provider at a reduced cost
- Internal training programmes may be officially approved for CPD purposes at a reduced cost, if it meets the required standard

4. CO-BRANDING AND JOINT INITIATIVES

- Your CFP® professionals employees may participate on FPI volunteer and pro-bono initiatives such as the FPI My Money 123™ financial literacy programme
- FPI will partner with your company on your external/ internal client events and initiatives
- Preferential rates on exhibitor stands and sponsorship at the FPI Annual Professionals Convention and other similar exhibitions
- Receive a free listing on the FPI website
- Receive up to five *FPI Corporate Partner™* plaques for use in office entrance lobbies
- Exclusive use of the *FPI Corporate Partner™* logo on stationery, advertising and other promotional material
- Discounted advertising rates in FPI newsletters, magazines and online publications

5. STAFF BENEFITS

Up to 10% discount to any *FPI Continuous Professional Development Event*

Up to 10% discount on *annual membership fee*

10% discount on *FPI Continuous Professional Development E-*

subscription.

Waiver of membership application

entrance fee of R750

An opportunity to be *featured / pro filed in FPI publications*

6. EMPLOYER OF CHOICE

Attract new talent via FPI database of university student candidate affiliates.



FPI Requirements

- Company agrees to align its training and development with the pathway to CFP® certification
- Company incorporates the FPI Code of Ethics and Professional Responsibility into their own code of conduct
- Company promotes continuous professional development for their advisors/planners
- Company supports the FPI mentorship programme
- Company supports FPI pro bono initiatives

PARTNER WITH US TODAY!

We truly value your commitment to the financial planning industry. By partnering with FPI, together we can continue to raise the levels of professionalism in the industry and share our vision in providing professional financial planning for all.



Financial Planning
Institute of Southern Africa

THE PROFESSIONAL STANDARD

Financial Planning Institute of Southern Africa NPC

84 Sophia Street (Cnr 11th Avenue), Fairland, Johannesburg, 2170

PO Box 6493, Weltevredenpark, 1715

Tel: 086 1000 FPI (374)

E-mail: fpi@fpi.co.za

www.fpi.co.za



CFP Certification *Global excellence in financial planning*[®]



*Join us on Facebook,
Linkedin & Twitter*

CFP[®], CERTIFIED FINANCIAL PLANNER[®] and  are trademarks owned outside the U.S. by Financial Planning Standards Board Ltd. The FPI is the marks licensing authority for the CFP[®] marks in South Africa through agreement with FPSB.