



Financial Planning  
Institute of Southern Africa

**THE PROFESSIONAL STANDARD**

# FPI STRATEGIC PLAN

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## Vision

Professional financial planning for all.

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## Mission

**The Financial Planning Institute'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.

## FPI MEDIUM-TERM STRATEGIC PLAN 2016 – 2018

Success Aspiration

LEADERSHIP	AWARENESS & RECOGNITION	STANDARDS
<p><b>L1.</b> FPI leads the financial planning profession and professional financial advice space through an articulation and implementation of a robust and well-defined strategy.</p> <p><b>L2.</b> Secure organisational sustainability (governance, financial, operational excellence and BBBEE).</p> <p><b>L3.</b> Lead transformation and diversity in the financial planning profession.</p>	<p><b>AR1.</b> Empower consumers by creating awareness of the benefit of professional financial planning through financial education.</p> <p><b>AR2.</b> FPI designations, and in particular CFP® designation, the must-have designations for consumers of financial planning and financial advice.</p> <p><b>AR3.</b> Achieve public/regulatory/legislative recognition and protection of financial planning as a distinct, evolving profession and FPI as the standards setting body for the profession.</p>	<p><b>S1.</b> Establish pre-eminent standards for practicing financial planning and financial advice.</p> <p><b>S2.</b> Establish, maintain and uphold world class certification standards for FPI designations.</p> <p><b>S3.</b> Establish, maintain and uphold world-class professional body standards.</p>

## FPI LONG TERM STRATEGIC PLAN – (FPI VISION 2025)

LEADERSHIP	AWARENESS & RECOGNITION	STANDARDS
<p><i>FPI is the pre-eminent financial planning standards authority for competent and ethical financial planners. CFP® certification is the standard of excellence for competent financial planning in South Africa.</i></p>	<p><i>The public is widely aware of the value of the financial planning process and of CFP® certification. Financial planning is recognised as a distinct professional practice. FPI is recognised by regulation/legislation as the standards setting body for the profession.</i></p>	<p><i>FPI has established standards of excellence for financial planning and members and stakeholders are in full compliance with CFP® certification programme standards.</i></p>