

SUPPLIER / VENDOR DATABASE REGISTRATION FORM

Company registered name:

(In block letters)

Core Business (Service):

(Select one only from the List of Services provided
on Page 6 of this document)

Delivery address:

The Finance Department
84 SOPHIA STREET, FAIRLAND
JOHANNESBURG
2170

Email: finance@fpi.co.za

SUPPLIER / VENDOR DATABASE REGISTRATION FORM TO BE COMPLETED BY ALL BUSINESSES SEEKING TO CONDUCT BUSINESS WITH FINANCIAL PLANNING INSTITUTE OF SOUTHERN AFRICA NPC (“FPI”)

The following important notes should be read carefully before the completion of this form

1. Financial Planning Institute of Southern Africa “FPI” reserves the right to accept or reject any application without being obliged to give any reasons. Suppliers that have been registered onto the Suppliers Database may have the opportunity to bid or quote on FPI’s acquisition requirements. Registration onto the Supplier Database does not guarantee business opportunities.
2. This form must be completed in full and signed by the duly authorised signatory.
3. Full signatures are required when alterations are made in this document.
4. If the information required is not applicable to your business, clearly insert the symbol “N/A” in the appropriate space.
5. Mark the appropriate square with a “X” where it is applicable to you.
6. If the space provided is left blank, your registration form may be regarded as incomplete and your business will not be registered on the database.
7. Suppliers must comply with all the registration criteria for registration to be finalised - failure to do so may result in the application being declined.
8. A company profile may accompany the registration form but will not be accepted as substitute for this application form - all fields on application form must be completed by applicant.
9. Applicants will be contacted via e-mail and must therefore submit an operating business e-mail address - failure to comply may result in excluding the supplier from the vendor database. Suppliers agree that all official business correspondence may be conducted via e-mail. Delivery to suppliers’ e-mail addresses shall constitute valid service of all correspondence.
10. Suppliers that have registered onto the Supplier Database should furnish Financial Planning Institute of Southern Africa with any change to the status of the information initially provided, as and when the information changes.
11. Suppliers are to ensure The Financial Planning Institute of Southern Africa is always in possession of a Valid Tax Clearance Certificate and Valid BEE certificate issued by a SANAS accredited agent or accredited rating agency or letter from auditor/accountant confirming annual turn-over or Affidavit for SMMES and Emerging Suppliers. **Suppliers whose tax clearance certificates and / or BEE certificates have expired will be blocked from The Financial Planning Institute of Southern Africa’s database until such time as valid documents are submitted.**
12. Suppliers that have registered onto the Supplier Database will be continuously monitored for their performance on work awarded to them by The Financial Planning Institute of Southern Africa. Continuous monitoring will form the basis to evaluate supplier performance which will have an impact on future opportunities with The Financial Planning Institute of Southern Africa.
13. Please read notes below very carefully:

Services: The commodity or activity the business wishes to register for as a supplier. (Only one service)

Owned: Having all the customary elements of ownership, including the right of decision-making and sharing all the risks and profits commensurate with the degree of ownership arrangements.

Where individuals are not actively involved in the management and daily business operations and do not exercise control over the enterprise commensurate with their degree of ownership, equity ownership may not be claimed.

14. Except for the specific goods or service procured by FPI, service providers may not offer any gift, hospitality or other benefit to any FPI official. To avoid doubt, branded marketing material is considered to be a gift. Furthermore, should any FPI official request a gift, hospitality or other benefit, the service provider is required to immediately report the matter to legal@fpi.co.za .
15. Verification prior approval as prospective service provider:
- Kindly note that all prospective goods / service providers seeking business opportunities with FPI are subjected to verification of directors or members. The verification process entails security checks on registration with the Companies Intellectual Property Commission (CIPC) and credit-rating of Companies and directors or members.
 - FPI needs your consent to proceed with such verification. By completing this form and continuing with this registration process you grant such consent to FPI.
 - FPI reserves the right to make such enquiries as it deems fit to satisfy it on the suitability of prospective goods / prospective provider.
16. For submission of physical documents, please mark the envelope clearly “Supplier / Vendor Database Registration”. Envelopes must be hand-delivered or posted to one of the following addresses:

Physical Addresses:

Supplier / Vendor Database Registration
Financial Planning Institute of Southern Africa
84 Sophia Street, Fairland, Johannesburg, 2170

Postal Address:

Supplier / Vendor Database Registration
Financial Planning Institute of Southern Africa
P.O. Box 6493, Weltevreden Park 1715

If sent by email, the subject line should clearly state **Supplier / Vendor Database Registration** and include the supplier/vendor name in the subject line.

17. Please furnish the Sender (*Business Name*), Contact Person, Telephone Number and the Core Business (Service) for ease of reference.

Authorised Signatory: _____

1. Business Profile (Please complete or tick where applicable)

Registered Company Name: _____

Trading Name (if different): _____

Business Type:

- | | |
|---|---|
| <input type="checkbox"/> Sole Trader | <input type="checkbox"/> Partnership |
| <input type="checkbox"/> Close Corporation | <input type="checkbox"/> Company (Private/Public) |
| <input type="checkbox"/> Government Institution | <input type="checkbox"/> Other (please <u>specify</u>) _____ |

Official Registration Number:

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(Please attach certified copy of proof of registration)

VAT Number:

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Postal Address: _____

Physical Address: _____

Province: _____

Province: _____

Postal Code: _____

Postal Code: _____

Toll Free Number: _____

Switchboard Number: _____

Web Address: _____

CONTACT PERSONS

Finance Department

Name: _____
Surname: _____
Designation: _____
Tel: _____
Cell: _____
Fax: _____
Email: _____

Sales Department

Name: _____
Surname: _____
Designation: _____
Tel: _____
Cell: _____
Fax: _____
Email: _____

Documentation to be attached to this application form

Item No	Documentation required	Included	If not included provide reason
1	Original certified copy of company registration documents (COR14.3)		
2	<u>Original</u> valid tax clearance certificate		
3	Original certified copies of CIPC documents		
4	Current BBBEE Certificate		
5	Company Profile		
6	Original Cancelled Cheque/Original Bank Stamped letter not more than 3 months old		

List of Services

Please mark clearly with a “X” the entity’s **Core Business** below (**select only one**) and write the selection on the cover page of this application form and on the back of the envelope (If submitting via Post/courier).

Number	X	Description of service
1	<input checked="" type="checkbox"/>	<u>Advertising (Placement of Advertisements)</u>
a	<input type="checkbox"/>	Electronic Media
b	<input type="checkbox"/>	Outdoor Media
c	<input type="checkbox"/>	Print Media
d	<input type="checkbox"/>	Other (Please specify)
2	<input type="checkbox"/>	<u>Archiving & Related Services</u>
a	<input type="checkbox"/>	Archiving & Related Services
b	<input type="checkbox"/>	Other (Please specify)
3	<input checked="" type="checkbox"/>	<u>Assets & Goods</u>
a	<input type="checkbox"/>	Audio & Video Systems
b	<input type="checkbox"/>	Electronic Equipment (Projectors, Cameras, etc.)
c	<input type="checkbox"/>	Kitchen / Electrical Appliances (e.g. Microwave, Urn, Electric Kettle, etc.)
d	<input type="checkbox"/>	Motor Vehicles
e	<input type="checkbox"/>	Office Equipment
f	<input type="checkbox"/>	Office Furniture
g	<input type="checkbox"/>	IT equipment
h	<input type="checkbox"/>	Other (Please specify)
4	<input type="checkbox"/>	<u>Assets Services, Maintenance and Support</u>
a	<input type="checkbox"/>	Audio & Video Systems (Maintenance & Support)
b	<input type="checkbox"/>	Refrigeration Equipment Repairs
c	<input type="checkbox"/>	Repair of Office Furniture
d	<input type="checkbox"/>	Repair of Electrical Equipment
e	<input type="checkbox"/>	Other (Please specify)
5	<input type="checkbox"/>	<u>Corporate Clothing & Gifts</u>
a	<input type="checkbox"/>	Corporate Clothing, Promotional Items & Gifts
b	<input type="checkbox"/>	Flowers
c	<input type="checkbox"/>	Framing of Certificates / Awards
d	<input type="checkbox"/>	Trophies, Shields and Engraving
e	<input type="checkbox"/>	Other (Please specify)
6	<input type="checkbox"/>	<u>Document Services</u>
a	<input type="checkbox"/>	Courier Services (incl. Postal Services)
b	<input type="checkbox"/>	Document Shredding Services
c	<input type="checkbox"/>	Document Storage Services
d	<input type="checkbox"/>	Other (Please specify)

7	<u>HR & Related Services</u>
a	Change Management Consultants
b	Executive Search Consultants
c	Performance Management Consultants
d	Personal Development Consultants
e	Recruitment Agencies
f	Remuneration & Salary Structuring Consultants
g	Skills Analysis & Development Consultants
h	Staff Wellness Services
i	Team Building (Venue, Events & Organisers)
j	Transcription Services
k	Counselling
l	Other (Please specify)
8	<u>IT & Related Services</u>
a	I.T. System Management, Maintenance and Support
b	I.T. Infrastructure Management, Maintenance and Support
c	I.T. Security Management, Maintenance and Support
d	I.T. Network Management, Maintenance and Support
e	I.T. Professional Services (Consulting & Contracting)
f	I.T. Communications Management, Maintenance and Support
g	I.T. Data Management, Maintenance and Support
h	I.T. Specialist Services (Projects, Architecture, Implementations & Business Analysis)
i	Other (please specify)
9	<u>Canteen and Cleaning</u>
a	Soft drinks
b	Carpets / Carpeting Installation
c	Crockery, Cutlery, Table Cloths, Doilies
d	Dry Goods (Tea, Coffee, Sugar, etc.)
e	Fresh Milk
f	Household Cleaning Materials
g	Protective Clothing
h	Shelving (Steel & Wood)
i	Other (please specify)
10	<u>Canteen and Cleaning Services</u>
a	Catering
b	Cleaning (General and Specialised, incl. Exterior Window Cleaning)
c	Dry Cleaning Services
d	Fire Detection, Prevention and Security Systems
e	First Aid Supplies / Equipment / Kits (OHASA)
f	Pest Control / Fumigation
g	Pot Plant Servicing
h	Sanitation
i	Supply of Newspapers, Journals, Publications, etc.

j		Other (please specify)
11	-	<u>Maintenance & Related Services</u>
a		Air Conditioning Specialist
b		Building Contractor
c		Carpet / Upholstery Cleaning
d		Construction Maintenance Services
e		Electrical (Globes, Plugs, Wire, etc.)
f		Fire Extinguisher Service
g		Furniture (Castors, Screws, Brackets, etc.)
h		Furniture Removals
i		Hardware
j		Mechanical Services
k		Office Alterations / Renovations (incl. Dry Walls / Partitioning, Ceiling, Flooring, Painting)
l		Plumbing (Toilet Seats, Washers, Taps, etc.)
m		Recycling Services
n		Repair of Printer / Copier / Scan / Fax Machines
o		Access control systems (Biometrics and Card)
p		CCTV systems (Network Cameras, DVR, Backups)
q		Fire Fighting systems (Fire extinguishers, Fire hoses, gas, fire mimic)
r		Other (please specify)
12	-	<u>Printing & Related</u>
a		Copying Services
b		Printing, Layout & Design (e.g. Annual Report, Folders, Business Cards, Diaries, etc.)
c		Signage
d		Other (please specify)
13	-	<u>Professional Services: Conference & Seminars</u>
a		Event Management (incl. Chairs, Décor, Screens, Stage, Podium, Catering)
b		Other (please specify)
14	-	<u>Professional Services: FORENSIC INVESTIGATIONS</u>
a		Investigations
b		IT Forensic Specialists
c		Technical Surveillance Specialists
d		Other (please specify)
15	-	<u>Professional Services: Other</u>
a		Accounting & Auditing Services
b		Actuarial Services
c		Attorneys (Corporate, Commercial & Labour)
d		Business Advisory Consultants
e		Business Analysis & Design Consultants
f		Business Assessments (Financial and Organisational Assessments)

g		Business Management Consultants
h		Business Process Re-Engineering Consultants
i		Business Solutions Consultants
j		Commercial Property Agents
k		Financial & System Integration Consultants
l		Financial Administration Consultants
m		Financial Systems Consultants
n		Governance Consultants
o		Insurance Brokers
p		Knowledge Management Solutions Consultants
q		Lean Management and Productivity Improvement
r		Market Research Consultants
s		Marketing Consultants
t		Media Liaison Consultants
u		Media Monitoring (Print & Electronic Media)
v		Monitoring and evaluation specialist (special focus on public sector programmes)
w		Organisational Dynamics Consultants
x		Procurement Advisory Services
y		Professional Photographers / Photography Equipment
z		Project Management Consultants
aa		Public Relations & Consulting Services
bb		Risk Management Consultants
cc		Stakeholder Perception Survey Services
dd		Strategic Planning & Development Consultants
ee		Strategic Planning Facilitation
ff		Trademarks
gg		Other (please specify)
16	-	<u>Rental</u>
a		Audio-visual Systems
b		Crockery & Cutlery
c		Décor
d		Furniture
e		Office Equipment
f		PC's, Laptops, Other Computer Equipment
g		Screens
h		Toilets
i		Vending Machines
j		Other (please specify)
17	-	<u>SAFETY & Security</u>
a		Background Checks / Verification Services
b		Biometrics Access Systems Installations
c		CCTV Systems Installations
d		Security Risk Assessment
e		Information security

f	Firefighting systems Installations
g	First aid boxes
h	First aid contents (bandage, scissor)
i	Locks & Keys
j	PA systems
k	Vehicle Tracking Systems
l	Alarm systems
m	OHS Compliance assessment
n	Other (please specify)
18	<u>Stationery & Related</u>
a	Barcode Labels
b	Printer Cartridges and Other Consumables
c	Recycling of Empty Toner Cartridges
d	Stationery
e	Other (please specify)
19	<u>Training (SETA Accredited, etc.)</u>
a	Assessor Training
b	Business Process Mapping & Modelling Training
c	Business Writing Skills
d	Career Management
e	Change Management Training
f	Communication Skills
g	Conflict Management Training
h	Corporate Secretariat Training
i	Customer Care Training
j	Diversity Training
k	Employee Wellness Programmes
l	Employment Equity Training
m	Etiquette Training
n	Facilitation Skills
o	Facilities Management Training
p	Financial Management Training
q	Governance Training
r	Health & Safety Programmes (CPR)
s	Human Resource Development Training
t	Human Resource Management Training
u	Interpersonal Skills Training
v	IT Development Training
w	Leadership Development Programmes
x	Management Development Programmes
y	Mentorship Training
z	Negotiation Skills
aa	Occupational Health & Safety Training (First Aid Training, etc.)
bb	Organisational Development Training

cc		Performance Management Training
dd		Personal Assistant Training
ee		Policy Management Training
ff		Prevention & Detection of Procurement & Contract Fraud Training
gg		Project Management Training (incl. Project Admin)
hh		Report Writing Skills
ii		Skills Development Facilitator Training
jj		Strategic Planning Training
kk		Supervisory Development Programmes
ll		Time Management Training
mm		ERM Training
nn		Other (please specify)
20	-	<u>Travel, Accommodation & Related</u>
a		Accommodation
b		Car Hire
c		Conference Facilities / Venues
d		Transport Services (Buses, Shuttles, Other)
e		Travel Agencies
f		Other (please specify)
21	-	<u>Examinations</u>
a		Assessors, Moderators, Invigilators
b		Exam setting
c		Authoring
d		Other (please specify)
22	-	<u>Events and Workshops</u>
a		Speakers
b		Video & webinar recording
c		Content creating
d		Other (please specify)
23	-	<u>OTHER NOT LISTED ABOVE (Please specify)</u>