



Financial Planning  
Institute of Southern Africa

**THE PROFESSIONAL STANDARD**

**Value Proposition**  
*for FPI Professional*  
*Designations*



[www.fpi.co.za](http://www.fpi.co.za)

## BE PART OF A COMMUNITY OF PROFESSIONALS

AS A CERTIFIED MEMBER OF A RECOGNISED PROFESSIONAL BODY, YOU WILL JOIN A STRONG NETWORK OF OVER

**6000** PROFESSIONALS IN THE FINANCIAL SERVICES INDUSTRY

### EXCLUSIVE MEMBER ONLY ACCESS

- Member-only access on the FPI website
- Your professional profile will form part of the FPI membership directory for all prospective clients to view
- As a member you can use the exclusive trademarked designation logos to boost your professional profile by branding your stationery, business cards and electronic signatures



### OTHER MEMBER BENEFITS YOU CAN ENJOY

- Most FPI professional designations are registered with the South African Qualifications Authority (SAQA) on the National Learner Records Database
- ***As a CFP® professional, you also acquire the Commissioner of Oaths status***
- FPI attracts over 1000 professional financial planners to the FPI Convention. Our delegates benefit from panel discussions, keynote presentations by industry experts as well as opportunities to learn, grow and network with other like-minded professionals
- Access to personal leadership development opportunities through volunteering or becoming an FPI brand ambassador

# FPI'S MEMBER DISCOUNT PROGRAMME THAT CAN SAVE YOU MONEY AND ADD REAL VALUE TO YOUR MEMBERSHIP

## BENEFIT

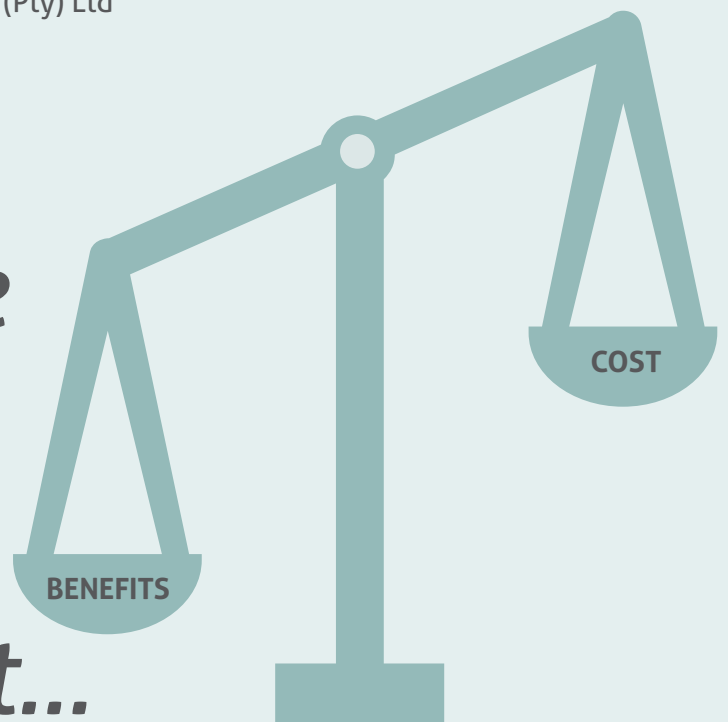
## VALUE

Free subscription to the LexisNexis online Financial and Legislation News . . . . .	R2 000
Free CPD webinar programme that awards up to 15 CPD points including ethics . . . . .	R1 500
A 50% discount on your SAIT membership . . . . .	Up to R1 715
Industry publications subscription savings per annum . . . . .	Over R1 000
RubberstampSA Commissioner of Oaths stamps ordered online . . . . .	20%
Member discount on FPI CPD events . . . . .	An average 20%
Astute Financial Services Exchange provides preferential rates on their services to all FPI members . . . . .	7% per transaction

## ALSO:

1. As a member you qualify for preferential rates on your indemnity insurance with Southern Cross Risk Management (Pty) Ltd
2. Your membership fees are tax deductible

*So you see, the **value** clearly **outweighs** the investment...*



# FPI CENTRE FOR PROFESSIONAL DEVELOPMENT

FPI HOSTED EVENTS ARE GREAT OPPORTUNITIES TO LEARN AND NETWORK

**OFFERING AFFORDABILITY AND VALUE:**

## Webinar introduction

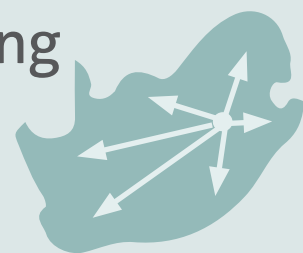
- 11 events with optional assessments
- Webinar programme includes minimum 2 ethics CPD points



**Special event packages** that can save you between **R400-R1700** per annum



Expanding CPD event footprint to **more areas** including smaller regions



## Improved events

- Quality speakers
- Cutting edge course material



**In depth courses** (online and face to face)



## *Superior services and supporting structures to propel your career and business growth*

We have developed tools and templates that can assist you in running an effective and efficient practice. These toolkits are free to members.

**SOME EXAMPLES OF THESE TOOLKITS ARE:**

- A guide to starting a financial planning practice
- A guide to becoming an advisory fee based practice
- A protection of personal information bill guide
- Investment policy statement guide
- Due diligence framework: a guide on selecting a service provider
- A social media guide
- Succession planning templates

# A THOUGHT LEADER IN THE FINANCIAL PLANNING INDUSTRY

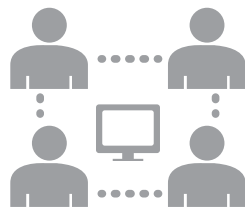


## ***FPI is the voice of the profession:***

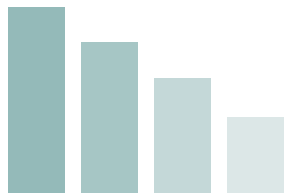
We represent the industry on financial planning issues in local and national media. To boost our public profile, **we have appeared on media platforms 285 times in 2014** informing the public of FPI and what sets our professionals apart from the rest.

FPI provides members with **free access to Member Updates and the FPI NewsBrief** (e-newsletters).

The institute provides **timely legislative updates** with cutting edge information to grow, maintain and enhance your practice.



FPI  
ENABLES  
AN ONGOING  
DIALOGUE ON  
IMPORTANT ISSUES  
AFFECTING THE  
FINANCIAL  
WELLBEING OF  
CLIENTS



## Access to market research survey results and trend analysis

Our Advocacy committee is actively engaged with the Financial Services Board (FSB) tackling issues very central to the financial planning profession such as Treating Customers Fairly (TCF) and the Retail Distribution Review (RDR).

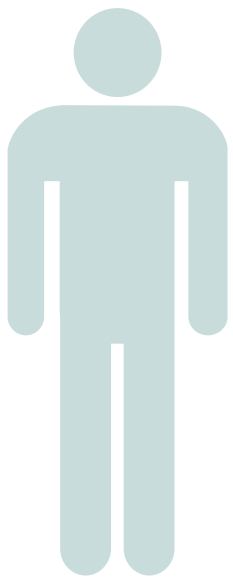
Our **free member magazine**, *The Financial Planner* is a peer reviewed quarterly publication featuring the profession's thought-leaders. This insightful publication cultivates the body of knowledge and answers to the needs of the financial planning professionals. The magazine also offers **2 CPD points with each issue**.



## HEAR WHAT OTHER MEMBERS SAY

*“Clients have built greater trust and confidence in me, knowing that I belong to a professional body. Nobody cares more about the profession than the Financial Planning Institute. FPI has exceeded my expectations in helping me maintain laws, standards and regulations that have become integral elements of financial planning. They have also given me the opportunity to grow professionally and to build relationships as well as network with like-minded professionals. Joining FPI was one of my best investments – it was the right thing to do.”*

**– Honeysette Eraman, CFP®, Erafin Consultancy**



*“Over and above the tangible and intangible benefits I receive as a member of FPI, I have to commend the staff for the outstanding service I receive. I have been a member of FPI for many years and the staff have always been professional, reliable and extremely helpful. I appreciate that I am always kept informed with industry changes that affect our line of work.”*

**– Poens Bester, CFP®, Finsura Financial Advisory Services & Short Term Insurance**



*“In the light of ongoing industry changes and regulation within the financial services industry, I am proud to be associated with FPI. Their involvement in establishing, communicating, educating and offering a host of services to their members and the public continues to ensure the improvement and professionalism of the industry they serve.”*

**- Brian Butchart, CFP®, Brenthurst Wealth Management (Pty)**



# FPI AND MEMBERS REACHING OUT TO THE CONSUMERS



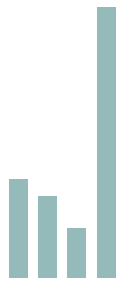
FPI has on going consumer initiatives that strive to inform the public of who we are as a professional body and the value of financial planning.

FPI provides plenty of opportunities for members who are interested in undertaking pro-bono work to allow you to give back to your community.

## NATIONAL PROMOTION OF THE FINANCIAL PLANNING PROFESSION



Financial Planning Week creates awareness of the need for professional financial planning and the benefits of using an FPI member.



Consumer clinics are held where you can engage with consumers on their financial planning needs.



Our student outreach programme ensures that the industry attracts new competent members.



FPI MYMONEY123™ allows you to educate consumers on budgeting, debt management and savings and investments while providing you the opportunity to introduce yourself and your practice. Our members are now presenting to an average of 500 to 700 South African consumers a month.



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Institute of Southern Africa

**THE PROFESSIONAL STANDARD**



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**CFP Certification** *Global excellence in financial planning*<sup>®</sup>



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