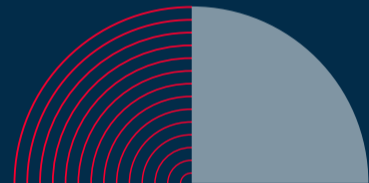
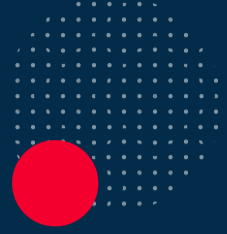


The Financial Planning Institute Corporate Partner™

Professional Financial Planning and Advice for all



Financial Planning Institute of Southern Africa



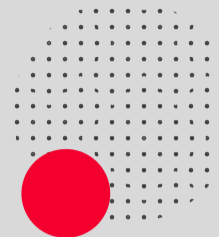
Our Vision

Professional financial planning and advice for all.

Our Mission

The Financial Planning Institute of Southern Africa mission is to advance and promote the pre-eminence and status of financial planning professionals and advisors whilst acting in the interest of society 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 and advice, building a recognition of the importance and need for such planning and advice 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 diversity and inclusion within the financial planning profession.
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Why become an FPI Corporate Partner™?

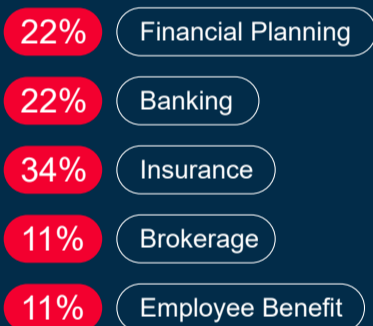
The FPI Corporate Partner™ status was created in the interest of supporting organisations to distinguish themselves and to demonstrate their level of commitment in maintaining the highest professional and ethical standards in the financial services sector.

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

- As the standard-setting professional body for the financial planning and advice profession in Southern Africa, we, as FPI, assist FPI Corporate Partner™ companies in achieving their business objectives by raising the competency level of their planners and advisors. We accomplish this by helping them align their training and development plans with the FPI pathway to RFP™, FSA™, and ultimately CFP® certification.
- By affiliating with FPI, you, as a Financial Institution and/or Financial Services Provider, demonstrate your commitment to the highest professional and ethical standards, earning the recognition and respect you deserve.
- 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 institution that supports high professional standards.
- You will be listed as an FPI Corporate Partner™ on the FPI website, attracting consumers who know that with you, they will access certified financial planners and advisors in good standing, who exceed the basic requirements set by the regulator.
- Your standing as an FPI Corporate Partner™ will attract employees with similar values.
- FPI's identification with you in consumer awareness campaigns, will give you positive exposure in the public space.

Why do companies value **CERTIFIED FINANCIAL PLANNER**[®] professionals?

Research Participation Overview: Sector representation:



5 things companies should do to **improve consumer's trust**:

- 1 Place the client's interests first.
- 2 Increase the level of client communication.
- 3 Improve disclosure and transparency.
- 4 Manage conflicts of interest.
- 5 Increase the number of advisers and planners.

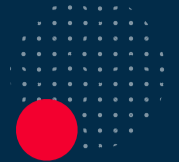
4 things firms value most about **CERTIFIED FINANCIAL PLANNER**[®] professionals?

- 1 80% of companies believe they have a higher rate of growth of assets under management.
- 2 80% of companies believe they generate higher revenue.
- 3 60% of companies believe they are more productive.
- 4 80% of companies believe they generate a higher profit.

What companies think clients value **from financial planners**:

When asked to rank 1-5 (5 being the highest and 1 the lowest), the results were as follows:

- 5 Create/preserve wealth.
- 4 Keep clients on track with their financial and life goals.
- 3 Provide a comprehensive picture of the client's finances.
- 2 Act in the client's best interest.
- 2 Sense of financial well-being.
- 2 Product/technical knowledge.



Why do companies value RFP™ and FSA™ FINANCIAL PLANNER® professionals?



RFP™ professionals meet FPI standards

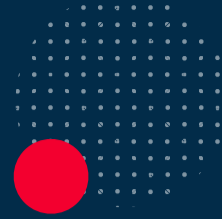
- RFP™ professionals meet the certification standards for this SAQA registered designation that aligns with regulatory competency requirements.
- The competency requirements include Education (NQF 5 qualification), one's year relevant experience, professional competency examination if recognition of prior learning (RPL) does not apply and Ethical standards in that RFP™ professionals adhere to the FPI Code of Ethics and Professional Standards
- RFP™ professionals must also complete 20 CPD verifiable CPD hours per cycle.



FSA™ professionals are financial advisors with a passion for excellence.

- FSA™ professionals must meet FPI certification standards that is in most cases over and above regulatory competency requirements.
- FSA™ professionals must hold and NQF 6 (old) or NQF 7 (new) full qualification, two years of relevant experience, write a professional competency examination if recognition of prior learning (RPL) does not apply and adheres to the FPI's Code of Ethics and Professional Standards.
- FSA™ professionals must complete 25 CDP hours per CPD cycle.





Why companies value CERTIFIED FINANCIAL PLANNER® professionals?



CFP® certification and public perception

In 12 months, 60% of companies expect an increase in the number of people seeking advice from financial planners. In 5 years, 60% of companies expect an increase in the number of people seeking advice.



CFP® certification and risk avoidance

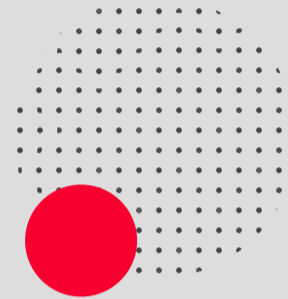
60% of companies indicate that CFP® professionals have lower compliance and legal risks compared to those who are not so certified.



CFP® certification and client retention

80% of companies indicated that employing CFP® professionals had a positive impact on client's satisfaction with the company and led to increased client retention.

60% of companies identified a growing demand for high net-worth clients to be serviced by a CFP® professional.



Financial Planning Institute of Southern Africa

FPI Corporate PartnerTM value proposition

Who may become an FPI Corporate Partner™?

Large financial institutions

Benefits:

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 RFP™ and FSA™ certification.
- By offering all interface support staff the opportunity to become affiliated with the FPI and benefiting from ancillary membership benefits.

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.

Continuous Professional Development – CPD

- Your internal training department may become an FPI Approved CPD Provider at a reduced cost should you meet the minimum number of professional members of the FPI (min of 25% of your KI's and reps linked to the account must be professional members of the FPI in order to qualify for any reduced costs and/or discounts
- Internal training programmes may be officially approved for CPD purposes at a reduced cost when it meets the required standard. Reduced fee is subject to 25% mentioned above.

Co - Branding and Joint initiatives

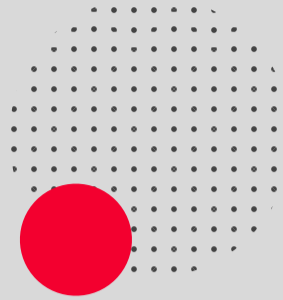
- Your FPI professional member employees may participate in FPI volunteer and pro-bono initiatives such as the FPI MyMoney123™ financial literacy programme and mentorship programmes.
- Preferential rates on exhibitor stands and sponsorship at the FPI Annual Professionals Convention and other similar exhibitions may apply from time to time
- Receive a free listing as Corporate Partner™ 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.

Staff Benefits (subject to 25% rule above)

- 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
- An opportunity to be featured / profiled in FPI publications

Employer of Choice

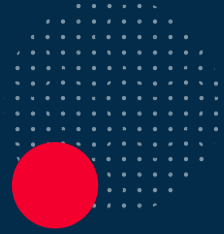
Attract new talent via FPI database of university student candidate affiliates.



FPI Requirements

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





Work with us **today**

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

Get **in touch**

Email us:

businessdevelopment@fpi.co.za

Contact us:

+27 11 470 6000

Visit our Website:

www.fpi.co.za

