



Financial Planning
Institute of Southern Africa

THE PROFESSIONAL STANDARD

CFP® PCE Challenge Exam Application

Tel: 086 1000 FPI (374)

Fax: 011 475 1158

Email: fpi@fpi.co.za

84 Sophia Street (Cnr 11th Avenue),
Fairland, Johannesburg, 2170
PO Box 6493, Weltevredenpark, 1715

1 Personal details

Surname		First Names	
ID or Passport Number			
Current Job Title			
Postal Address			
Email Address			
Cellphone Number			

2 Qualifications obtained

Qualification Title			
Provider Name			
SAQA ID		Curriculum Code	

Qualification Title			
Provider Name			
SAQA ID		Curriculum Code	

Qualification Title			
Provider Name			
SAQA ID		Curriculum Code	

Qualification Title			
Provider Name			
SAQA ID		Curriculum Code	

Qualification Title			
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Provider Name			
SAQA ID		Curriculum Code	

3 Already obtained designations

Professional Body Name				Tel: 086 1000 FPI (374)
Designation				Fax: 011 475 1158 Email: fpi@fpi.co.za
Requirements for obtaining the above designation				
Underlying Qualification	PO Box 6493, Weltevredenpark, 1715			
NQF Level		Years of experience needed to obtain the designation		
Name of Board / Admission Exam				
Results obtained				
Professional body contact details				
Contact Person				
Telephone Number				

4 Work experience (from the most recent job to the oldest)

Employer details				
Employer				
Job Title		Years of Service		
Reference Name		Reference Contact Number		

Employer details				
Employer				
Job Title		Years of Service		
Reference Name		Reference Contact Number		

Employer details				
Employer				
Job Title		Years of Service		
Reference Name		Reference Contact Number		

Employer details			
Employer			
Job Title		Years of Service	
Reference Name		Reference Contact Number	

Employer details			
Employer			
Job Title		Years of Service	
Reference Name		Reference Contact Number	

5 Motivation

Why do you believe you qualify to write the CFP® Professional Competency Exam (PCE)?

6 Documents to submit with this application

1. Certified copies of your qualifications obtained as mentioned in section 2 above;
2. A letter from the professional body confirming your membership and designation as mentioned in section 3 above; (if applicable)
3. A certified copy of your identity document (ID) or passport and
4. Latest, updated version of your *Curriculum Vitae* (CV)

7 Declaration

I, _____ acknowledge that I have read and understood the Financial Planning Institute of Southern Africa's (FPI) Challenge Exam criteria.

I also confirm that that should I be given access to write the exam, I will comply with (but not limited to) the:

- PCE Examination Policy
- FPI's Code of Ethics and Professional Responsibility

Applicants

Signature

Date