



FPI Financial Planning
Institute of Southern Africa
THE PROFESSIONAL STANDARD

PROSPECTUS 2021

FPI PROFESSIONALS
CONVENTION
25-26 October
2021



ABOUT US

The Financial Planning Institute of Southern Africa (FPI), a South African Qualifications Authority (SAQA) recognised professional body for financial planners and advisers, serves the public by ensuring that people who carry an Advise (RFP™ and FSA™) or Planning (CFP®) designation are qualified, experienced and professional.



We are recognised internationally, a founding and current affiliate member of the international Financial Planning Standards Board Ltd (FPSB) based in the United States of America. Along with 27 other affiliate member countries we offer CFP® certification, the highest recognised professional designation worldwide for a financial planning professional.

VISION

Professional financial planning and advise for all

MISSION

The FPI's mission is to advance and promote the pre-eminence and status of financial planning and advice professionals, while at all times acting in the interests of the society (community, constituency) whom the profession serves.



OUR EVENTS

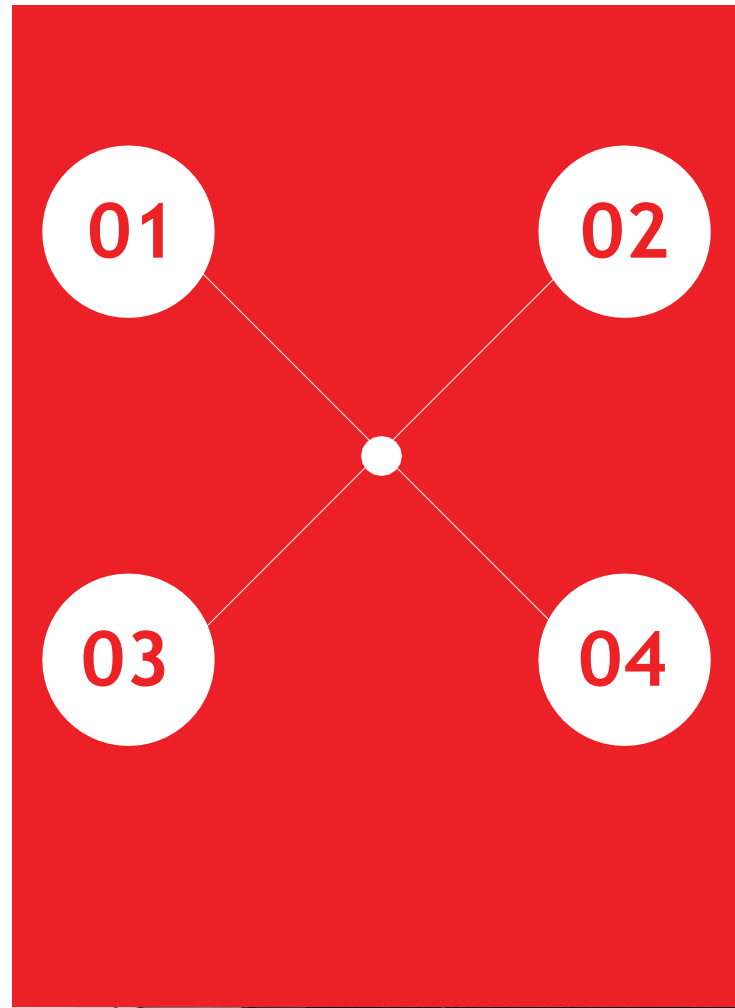
2021 will mark the 32nd FPI Professionals convention, which is regarded as the largest and most significant event in the calendar of financial planning professionals. The convention has a proud history of hosting the best local and international speakers on topics that add value to South Africa's financial planners and advisors, and the customers we serve. The event attracts over 1 000 delegates, including exhibitors and sponsors, each year.

Tax Planning March 2021

Our Tax Planning focuses on the current Tax and budget season/year. This event is held via a live on-line platform.

Retirement Planning August 2021

Our Retirement Planning Forum focuses on the current retirement landscape aiming to enable financial planners to enhance their retirement offering to their clients. This event is held via a live on-line platform



Estate Planning May 2021

An event focused on an update for Financial Professionals on any tax and estate planning related matters. This event is held via a live on-line platform.

Annual Refresher January 2021

This is our most popular event that provides financial planners and advisors with the most pertinent legislative updates of the year. This event takes place in Johannesburg, Pretoria, Durban, Cape Town as well as a live on-line platform.

WHY PARTNER WITH US

The FPI's Professionals Convention hosts 1000 delegates and is advertised on various media platforms. FPI has 5000 professional members from various financial planning related backgrounds.

By partnering with us your brand is exposed to the various areas and the Convention is a great platform to showcase your brand and new products or services you have to offer.

Exhibitors benefit by gaining exposure via our social media platforms which reach over 20 000 individuals. Media partners are also present at the Convention which gives exhibitors the advantage of pre-event and on-site branding opportunities.

FPI represents the profession of various regulators and stakeholders in the financial planning profession. A partnership with FPI offers you extensive brand exposure on various platforms.



YOUR INVESTMENT

FPI Professional Convention

Convention Sponsorship **R 550 000**

Convention sponsorship includes branding on all Convention marketing, an exhibition stand, delegate bag insert, 5 delegate passes, full page advert in the convention magazine and logo on holding slides in main plenary. Speaker opportunity aligned to Convention theme.

Other Opportunities:

Delegate Bags **R 250 000**

Every delegate is issued with a convention bag at the registration desk. These bags are valued by convention attendees and a great brand take away.

Registration Desk **R 150 000**

Branding on the registration desks and banners can be placed in the registration area. See picture in Gallery.

Café Pocket Sponsor **R 150 000**

This is a branded area where delegates are able to enjoy lunch, charge electronic devices and network. See picture in Gallery.

Exhibition shell scheme/floor space **R 47 000**

Includes exhibition stand lighting, display of exhibitor name on fascia board, table, two chairs, two free delegate passes, one marketing item in delegate bags, 20% discounted rate on additional Convention passes.

Stationery Sponsor **R 50 000**

Sponsors branding will be placed on stationery provided to each delegate.

Lanyard & Badge Sponsor (SOLD) **R 30 000**

Your branding will be visible on the lanyards & badges of the attendees. Delegates need their badges to access the sessions. This is a great brand take away.

Delegate bag insert **R 15 000**

Sponsor can place marketing material into the delegate bags.

FPI Gala Dinner

Sponsorship **R 500 000**

FPI's annual Gala Dinner recognises excellence in financial planning by awarding individuals with various awards including the coveted Financial Planner of the Year and Professional Practice of the Year.

The sponsorship will include branding at the gala dinner, logo on menu cards, branding on holding slides, branding on all invites, a table booking and recognition of sponsorship by the master of ceremonies. Opening address from Sponsor.

Other sponsorship opportunities

Sponsorship is available for our other events. For more information about the sponsorship of the events, please email academy@fpi.co.za

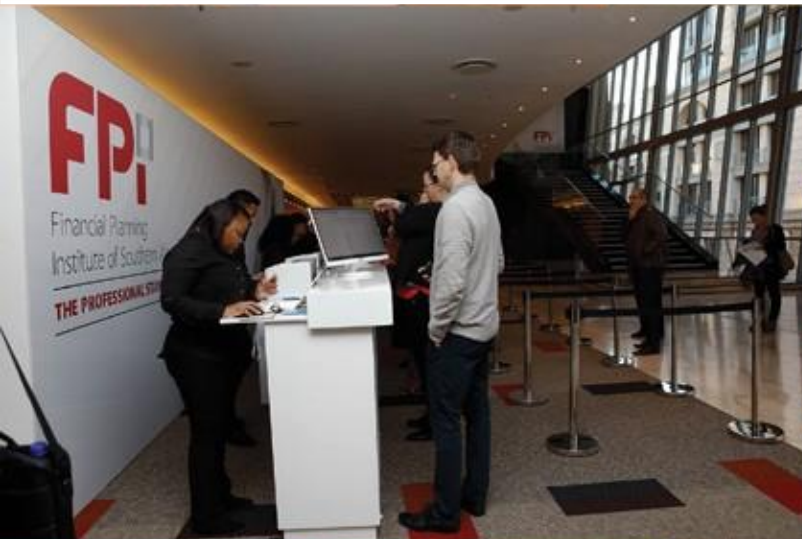
Annual Refresher - January **R250 000**

Tax Planning - March **R120 000**

Estate Planning - May **R120 000**

Retirement Planning - August **R120 000**

FPI Webinar (*Financial Management, Asset Planning, Investment Planning, Retirement Planning, Tax Planning, Risk Planning, Estate Planning*) **R 10 000**





Contact Information

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