

FPI

Financial Planning
Institute of Southern Africa

THE PROFESSIONAL STANDARD

COMPANY PROFILE

www.fpi.co.za



VISION

Professional financial planning for all.

OUR HISTORY

The Financial Planning Institute of Southern Africa (FPI) is a South African Qualifications Authority recognised professional body for financial planners in South Africa. It is the only institution in South Africa to offer the CFP® certification and has been approved by the South African Revenue Service (SARS) as a Recognised Controlling Body (RCB).

As a non-profit professional body, founding and affiliate member of Financial Planning Standards Board (FPSB), the Institute exists to improve the level of professionalism and positively influence the quality of advice provided by its members. There are 25 other affiliate member countries who offer the CFP® certification.

In 2012, FPI was highly commended by FPSB and awarded Tier 1 Affiliate Status for receiving 96% in the global assessment. This is the highest achievement any affiliate has ever received.

OUR VISION & MISSION

Our vision is one of professional financial planning for all.

Our mission is to advance and promote the pre-eminence and status of financial planning professionals, while at all times acting in the interests of the society whom the profession serves.

OUR MISSION

The Financial Planning Institute's mission is to advance and promote the pre-eminence and status of financial planning professionals, while at all times acting in the interests of the society (community, constituency) 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, building a recognition of the importance and need for such planning 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 transformation within the profession.

Value of affiliation

As part of our corporate engagement strategy, we offer the financial service providers with an opportunity to affiliate themselves with us by applying for the FPI Corporate Partner™ or FPI Approved Professional Practice™ brand.

Benefits of affiliation

- Your business will be identified by your peers the financial services industry as being one of the companies who are committed in raising the standards of professionalism.
- The accreditation will also provide your organisation with positive exposure in the public space.
- Your organisation will become an employer of choice that attracts competent and professional employees.

Value of CFP® certification

- Recruiters and prospective employees recognise the benefits of the CFP® designation. These include:
 - Higher income potential
 - Enhanced career and employment opportunities with financial services companies
 - The personal satisfaction of achieving the highest standard of the financial planning® profession
 - Joining the exclusive league of financial planning professionals
 - The CFP certification is trusted among financial professionals and consumers
 - Recognition in more than 25 countries around the world
 - The satisfaction of assisting clients in meeting their financial goals
 - Meeting the global benchmark for competency, ethics and professional practice standards to provide comprehensive financial planning services

Public Policy

As a professional Body we are constantly working with industry, regulators, policy makers and the public to educate and promote virtues of financial planning as a distinct and evolving professional practice.

As a thought leader within the industry, we proactively look for opportunities to advocate a better financial planning profession, as well as best practice standards. This is achieved through a combination of technical competency, resource availability and committed member input.

The Institute aims to play an important role in advancing the financial planning profession in the years to come. Our leadership role within the financial services industry allows us to provide balanced, credible input and commentary to both government and the public.

CPD Offerings

To find more about the FPI, what we do and the designations we offer contact us on the details below:

Physical Address:

84 Sophia Street,
Fairlands
Johannesburg
Gauteng
South Africa

PO Box 6493,
Weltevredenpark, 1715
Tel: 011 470 6000
E-mail: fpi@fpi.co.za
www.fpi.co.za



www.fpi.co.za



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