Financial Planning
Institute of Southern Africa
THE PROFESSIONAL STANDARD

The Financial Planning Institute of Southern Africa's – 2022 Annual Refresher

The Financial Planning Institute of Southern Africa (FPI) **–** 2022 Annual Refresher is a full-day online webinar. It will unpack some of the most important legislative developments from 2021, and other key topics affecting the financial planning industry.

The event will be conducted as a webinar, allowing everyone to participate safely. Despite being held virtually, the webinar won't be a one-way affair. Attendees will be given the opportunity to engage with the speakers after each presentation.

Experts have been chosen to talk about a wide range of topics, from practical advice about retirement and tax planning, to the future of the profession.

Starting strong.

Wessel Oosthuizen CFP® will kick off proceedings with two sessions on addressing recent court determinations, and how these will impact financial planners. He'll apply practical examples relevant to members in terms of:

- estate planning;
- legislative changes to retirement planning;
- a tax update for financial planners;
- clarity on the division of living annuities at death and divorce for investment planning;
- crypto assets and investment planning; and
- general practice and business tips, including how open finance will affect financial planning.

Wessel developed and managed the former Centre for Financial Planning Law at the University of the Free State (now the School of Financial Planning Law). He has served on FPI's board of directors, and also served for more than 10 years on numerous international committees, including the FPSB Professionalism and Standards Committee.

He's an independent financial planner and lecturer at Stellenbosch University Business School, and is a member of the FPSB Global Job Analysis and Global Exam Specification panel.

The GEPF and you.

Maya Fisher-French presents #MoneyMatters on eNCA, is the editor of the money pages at City Press, and is the founder and editor of the personal finance site mayaonmoney.co.za.

With her inimitable style, Maya will spend half an hour discussing the Government Employees Pension Fund, more specifically how the GEPF works to ensure 'best advice' for clients who are members of the fund.

Legal eagle.

Dan Berglund CFP® will address the latest changes to the Long-Term Insurance Act and how they affect employee benefit schemes. He'll be looking at how the Act governs unapproved and funeral benefits paid to a deceased estate without a completed beneficiary form, in respect of these two benefits. He'll also address in-fund preservation and what a planner should know.

Dan is a financial advisor at Liberty Group South Africa, and vice chairperson of FPI's Employee Benefits Competence Committee. His career in the financial planning industry spans more than 20 years.

Investment matters.

Luthando Mzilikazi CFP® and Jaco van Tonder will be tackling investment-related matters and how they affect financial planning.

Luthando is a Sales Manager at Ninety One and holds a BCom degree in Economics and Finance and a BCom Honours degree in Finance from the University of Cape Town. She's a CFP® professional, and will soon complete her MCom in Investment Management at the University of Cape Town.

Jaco has 22 years' industry experience and is the head of advisor services in South Africa at Ninety One. He's a Fellow of the Institute of Actuaries, and holds a BSc (Hons) Actuarial Science degree from the University of Stellenbosch.

Legislation.

Lelane Bezuidenhout CFP® has been working in the financial services industry since 1999. She's the chief executive of FPI, and serves FPI's vision of 'professional financial planning and advice for all' at all times. She's ably assisted by David Kop, FPI's director for relevance, who has been in financial services for more than two decades and who works tirelessly to ensure that financial planning is viewed as a profession alongside the traditionally recognised professions.

Lelane will be talking about a FAIS Ombudsman determination that is relevant to financial planners.

Event Details
Date: 9 March 2022
Time: 08:45 to 15:20
Venue: Online
CPD hours: Total – 5.5 Verifiable CPD hours
(4 Technical Verifiable CPD hours; 1 General Verifiable CPD hour; 0.5 Ethical Verifiable CPD hour)
Cost: R850 for FPI-designated members; R1 063 for non-members

- END -

Financial Planning Institute of Southern Africa
Non-Profit Company | Reg no. 2004/028055/08

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

+27 11 470 6000
info@fpi.co.za
www.fpi.co.za