
Financial Planning Institute of Southern Africa



Financial Planning
Institute of Southern Africa

THE PROFESSIONAL STANDARD

FPI AWARDS GUIDE FOR THE FOLLOWING AWARDS:

HARRY BREWS

IT STARTS WITH ME

TOP PCE CANDIDATE

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FPI Harry Brews' Award (previously Chairman's Award)

Background

The Chairman's Award was introduced in 2010. In 2013, FPI renamed the award in honour of Harry Brews, the man who transformed South Africa's life assurance industry, the first President of the then, Institute of Life and Pensions Advisors (ILPA).

Objective

The award recognises an individual who has made life-long outstanding significant contributions to FPI through promoting the Institute and its marks and/or the financial planning profession in the areas of service to society, academia, training, government, media or any other professional activities. They must also exemplify the FPI ethics principles of client first, integrity, objectivity, fairness, professionalism, competence, confidentiality and diligence.

The Award

The winner is recognised at the Annual Award Ceremony Gala Dinner and receives:

1. A trophy/plaque and certificate.
2. Recognition on the FPI website and in the media.
3. A speaker slot in some of the FPI's regional and consumer events from September 2022 to May 2023.
4. Free attendance at one FPI Professionals Convention 2023 (*excluding* travel and accommodation costs).
5. A complimentary ticket (+1) ticket to the Annual Awards Ceremony Gala Dinner taking place on the 19th October 2022 (*excluding* travel and accommodation costs).

Sponsorships

FPI may contract annually with sponsors based on a contractual agreement which determines the terms and conditions of the sponsorship for each award.

Criteria

1. Nominations with a motivation must be submitted in writing to FPI.
2. The winner does not have to be an FPI member.
3. The FPI Awards Working Group will evaluate the nominations and provide a shortlist to the FPI Chairperson.
6. The winner will be selected by the FPI Chairperson.
7. The FPI Chairperson may select a candidate not nominated by the FPI Awards Working Group.

FPI It Starts with Me Award

Background and objective

This award, launched in 2015, in line with the **FPI It Starts with Me** programme to recognise the CFP® professional who contributes, supports and promotes the CFP® mark by:

Entrenching the CFP® mark into your work life

- When recruiting planners in your practice, make CFP® certification a mandatory requirement.
- Frame and display your CFP® professional certificate your office or boardroom.

Investing in your personal brand

- Continue to seek to grow and invest in yourself and your career.
- Attend CPD events and keep abreast of industry changes.

Knowing your professional body

- Keep yourself updated with FPI news.
- Become an active part of the community of FPI professionals

Letting others know that you are a CFP® professional

- Introduce yourself to people as a CFP® professional.
- Inform your clients of the value you bring as a CFP® professional.

Volunteering

- Mentor a CFP® certification student.
- Volunteer at school and university career events and promote your CFP® certification and your pathway to achieving the global symbol of excellence in financial planning.

The Award

The winner is recognised at the FPI Gala Dinner to be held on the 19th October 2022 at the Annual Awards Ceremony Gala dinner and receives:

1. A trophy/plaque and certificate.
2. Recognition, on the FPI website and in the media.
3. Free attendance at the FPI Professionals Convention 2023 (excluding travel and accommodation costs).
4. A complimentary ticket (+1) to the FPI Gala Dinner taking place on the evening 19th October 2022 (excluding travel and accommodation costs).
5. One-year Free membership to FPI

Sponsorships

FPI may contract annually with sponsors based on a contractual agreement which determines the terms and conditions of the sponsorship for this award.

Criteria

1. Submit a short motivation or a 700-word (PDF) article or 90 second video clip (WMV file preferred) on how you do your bit in raising awareness about the CFP® mark. Or nominate your fellow CFP® professional, in your region, who has demonstrated and met the above “*FPI It Starts with Me*” categories.
2. Entrants must be active CFP® professionals.

FPI Top PCE Candidate Award

Background

These awards date back to the Institute of Life and Pension Advisers (ILPA) when top students were awarded in the professional ILPA examinations. Due to the professional qualifications being administered by a number of educational institutions over the last few years, students were awarded in the categories of overall top candidate in the Postgraduate Diploma/B Com Honours in Financial Planning, the top candidate in the FPI Case Study (introduced in 2008) and the Advanced Postgraduate Diploma subjects.

In 2010, the awards were reviewed and in 2011 only the top *candidate* in the FPI competency examinations; namely the CFP® Professional Competency Examinations is recognised.

Objective

The award recognises the top candidate who completed the CFP® Professional Competency Examinations for professional membership of FPI.

The Award

The winner is awarded at the FPI Professionals Convention and will receive:

1. A trophy and certificate.
2. Recognition on the FPI website and in the media.
3. Free attendance at one FPI Professionals Convention (excluding travel and accommodation costs).
4. A complimentary ticket (+1) to the FPI Gala Awards Dinner (excluding travel and accommodation costs).
5. One-year free membership to FPI

Sponsorships

FPI may contract annually with sponsors based on a contractual agreement which determines the terms and conditions of the sponsorship for each award.

Criteria

1. The winner is selected from the highest mark received for CFP® Professional Competency Examinations. This includes any candidate who complete the examinations with a re-write.
2. Examinations written from August 2021 to February 2022 will be taken into consideration.
3. The mark must be higher than the minimum pass mark required as determined by FPI.
4. The marks, and the winner, are verified by the certification department.

How to enter or nominate

FPI Harry Brews' Award

Nominations for the 2022 competition are now open and will close on **the 02nd August 2022** Submit your Nominations to awards@fpi.co.za

FPI It Starts with Me Award

Nominate your regional representative by emailing awards@fpi.co.za. Submit your written or video entry including the following details

Nominations or entries for the 2022 competition close on **02nd August 2022**

FPI Top Candidate Award

Certification to provide name of top candidate to the awards committee by **02nd August 2022**

Contact us

For more information on all FPI Awards, contact FPI on (011) 470-6000 or email awards@fpi.co.za

Rules of the awards

1. Entrants or candidates may not be the defendant in a criminal proceeding, a defendant or respondent in a civil, self-regulatory organisation or government agency inquiry, investigation or proceedings, as well as mediation or arbitration, relating to their professional or business conduct, convicted of a criminal offence, been found guilty in a disciplinary hearing in respect of an offence involving dishonesty (for example, fraud, theft etc.), been declared insolvent by a Court of Law or sequestered, had a civil judgement (pertaining to unpaid monies) against them or had an application against them to have their FSP license withdrawn or suspended by the Financial Sector Conduct Authority (FSCA) in terms of the licensing requirements in the FAIS Act 37 of 2002.
2. Attendance at the FPI Professionals Convention must be within a two-year period from receipt of the prize.
3. Prizes may not be converted to cash.
4. Winners must exemplify FPI's ethics principles of client first, integrity, objectivity, fairness, professionalism, competence, confidentiality and diligence.
5. Full disclosure of any conflict of interest is required by all parties involved with the awards, the selection of a winner, participation on a committee or judging panel. Any conflict of interest will be reviewed by the FPI Awards Working Group for a decision and if necessary, this may be taken up with the FPI Board of Directors. This includes any conflict which may arise due to sponsorships.
6. All information provided by entrants and candidates will be held in the strictest confidence.
7. Any external party involved in the competition, appointed by FPI, will be required to sign a confidentiality agreement.
8. All decisions are final and no correspondence will be entered into.
9. The awards processes, scores and final results are subject to audit by the FPI auditors.
10. The FPI Awards Guide is managed by the FPI Awards Working Group and is reviewed annually.