
Financial Planning Institute of Southern Africa



Financial Planning
Institute of Southern Africa
THE PROFESSIONAL STANDARD

2022 FPI Financial Planner of the Year Entry Form

NB: Please read the 2022 Financial Planner of the Year Competition Guide before completing the entry form as this contains important information about the competition and process.

Entrant Details

Personal Details:

Title: _____

Surname: _____ First name (s): _____

ID number: _____

Professional Designation (CFP® professional): Yes No

Membership Number: _____

Email: _____

Physical address: _____

Postal code: _____

Telephone (W): _____ Cell: _____

I warrant that all information provided in this entry form is true and correct.

Signed at _____ on this _____ day of _____
2022.

I, _____ hereby acknowledge the terms and conditions of the 2022 Financial Planner of the Year competition and undertake to adhere to them. By entering the competition, I consent to FPI conducting a full background and reference check on me in its sole discretion

Accept

Practice Details

1. Company name: _____

2. Nature of your practice: _____

3. What is the ownership structure in your practice (for example; owner, employee, agent)?

4. FSP licence number: _____

5. Licence categories:

6. What services do you offer your clients (estate and trust planning, investment planning, risk planning, retirement planning, health care planning or tax planning)?

7. How many clients do you have as of 31 December 2021? _____

8. If you provide investment advice, what were your funds under management as at 31 December 2021?

9. What outsourced agreements for services do you have in your practice?

Your Career

2. Are you involved in any financial literacy education, charity fundraising initiatives or any other consumer or education activities? If so, please provide details:

3. Do you participate in the media to promote financial planning to consumers (articles, broadcast media)? If so, please provide details:

Additional Questions

1. Please provide a comprehensive narrative on your understanding of the role of a financial planner?

4. Provide a video no longer than 5 minutes outlining the following:

- What would you want to achieve by entering and possibly winning this prestigious award?
- Describe your involvement in the financial planning profession?
- Describe or highlight any consumer education initiatives.

***Disclaimer:** All video submissions will be utilised for internal judging processes only and not for external marketing purposes without the authorisation of the award entrant.

Note: How to submit your video

Record your video on a digital platform like Zoom or Microsoft teams and save it on your desktop. Make the URL shareable and e-mail the link to us with your submission. (Please ensure your sound works)