

## Member Renewal

### Step 1 – Renew your membership

When accessing your profile (member portal)

Click on: **Renew your Membership**

This profile summary will merely display your profile details and you are unable to change any of your details on this screen

The screenshot shows the 'My Profile' page with a sidebar on the left containing various service requests and benefits. The main content area has a tabbed interface with six tabs: Profile Summary (1), Personal Details (2), Contact Details (3), Professional Details (4), Experience (5), and Public Information (6). The 'Profile Summary' tab is active, displaying a 'Renew your Membership' button. Below the button, a message states: 'These fields cannot be amended. Choose the corresponding tab at the top of the page to amend your details'. The page is divided into two columns: 'MEMBERSHIP DETAILS' and 'CONTACT DETAILS'. The 'MEMBERSHIP DETAILS' column includes fields for Member Number, Membership Type (set to 'CFP Professional'), and Completion CPD status (set to 'Non Compliant'). The 'CONTACT DETAILS' column includes fields for Email Address, Cellphone Number, and Physical Address.

### Step 2 – Personal Details

Click on Personal Details

Here you will be able to edit and update all your personal information. Please make sure that this is correct and all information has been updated.

The screenshot shows the 'My Profile' page with the 'Personal Details' tab (2) selected. The 'PERSONAL DETAILS' section contains several fields: Title (dropdown), First Name, Middle Name, Surname, Initials, Date of Birth (with a calendar icon), ID Type (dropdown, set to 'South African ID'), SA ID Number or Passport, Known as, Designation Start Date (with a calendar icon), Profile Picture (with a 'Browse' button), and Membership end date. Below this is the 'DEMOGRAPHIC' section with fields for Gender and Language.

### Step 3 – Contact Details

Please check and update all your contact information.

Make sure you select your address preferences.

Then: **SUBMIT**

**My Profile**

- My Service Requests
- Submit Service Request
- Benefits
- Track my CPD
- Complimentary CPD
- Events
- FPI Community
- Products
- Tax Practitioner Application
- Orders / Invoices

Profile Summary   Personal Details   **Contact Details**   Professional Deta...   Experience

**CONTACT DETAILS**

Email Address \*

Cellphone Number \*

Physical Address

Street Line 1   Street Line 2

Street Line 3   City

Province   Country \*   Postal Code

Work Address

Street Line 1   Street Line 2

Street Line 3   City

Province   Country \*   Postal Code

Address Preference

Preferred Mailing Address \*

Physical

Postal

Work

Preferred Shipping Address \*

Physical

Postal

Work

Preferred Billing Address \*

Physical

Postal

Work

**Submit** Previous

## Step 4 – Professional Details

**Associated corporate account** – this area will reflect the name of a corporate if you are linked to a corporate account.

**FPI Region** - Below is an overview of the relevant FPI regions. Please select the area you reside in.

**Central Region** - including the Free State province, the Northern Cape Province, as well as the part of the Northwest province southwest of the Mafikeng-Lichtenburg-Klerksdorp line;

**Eastern Cape** - the whole of the Eastern Cape Province;

**Gauteng Region** - consisting of that province excluding the greater Pretoria area, but including the south eastern Highveld of Mpumalanga and the eastern part of Northwest province up to the Mafikeng-Lichtenburg-Klerksdorp line;

**KwaZulu-Natal** - the whole of the Kwa-Zulu Natal Province;

**Northern Region** - consisting of the greater Pretoria area of Gauteng, the rest of Mpumalanga and the whole of the Limpopo province;

**Western Cape** - the whole of the Western Cape Province.

Please remember to submit again at the bottom of the screen.

### Step 5 – Experience

Should you wish to add additional information please add and select the **Save** button at the bottom of the screen.

### Step 6 – Public Information

Please note that the information must be accurate as it will be provided to consumers via the Let's Plan Website

### Step 7 – Declaration, Code of Ethics and Terms and Conditions

Please answer each question by clicking on the block to the left of each question which will enable a yes or no answer.

NB: Please make sure you scroll down to answer all questions (a) – (h)

Then select the blue **save** changes button

View and agree to the renewal agreement by Selection “Yes” and again submit.

Select terms and conditions and click on submit

My Profile  
My Service Requests  
Submit Service Request  
Benefits  
Track my CPD  
Complimentary CPD  
Events  
FPI Community  
Products  
Tax Practitioner Application  
Orders / Invoices

Profile Summary Personal Details Contact Details Professional Deta... Public Information Declaration & C... Terms and Condit...

**CODE OF ETHICS**  
Scroll down to complete questions by selecting the 'Yes / No' option on the left hand column  
**Annual professional members' renewal - Ethics declaration**  
To renew your FPI membership please select YES or NO in answer to questions (a) to (h) below.  
If you had answered 'yes' to any question previously and FPI issued you with an outcome letter that you need not report on it again, you may ignore the event. Always retain outcome correspondence to satisfy future disagreements.  
If you answer 'yes' to any questions below you must submit a summary of the principal facts and their outcome via email to: legal@fpi.co.za. Include copies of evidentiary documentation.

Click in the blocks below to select YES or NO

	Question
No	(a) Have you ever been a defendant or accused in a criminal proceeding involving a charge or element of fraud, theft, money laundering, corruption, racketeering, dishonesty, or other financial misconduct?
No	(b) Have you ever been a defendant, accused or respondent, in a personal or representative capacity, in a disciplinary proceeding of any nature relating to allegations of dishonesty, any form of financial misconduct, regulatory transgression, unprofessional conduct or improper advice?
No	(c) Are you currently insolvent or do you have an unfulfilled civil judgement (pertaining to unpaid monies) against you?
No	(d) Are you currently debarred in terms of the FAIS Act 37 of 2002 (as amended)?

**Answer all 8 questions then save changes**

No (d) Are you currently debarred in terms of the FAIS Act 37 of 2002 (as amended)?

1 - 8 of 8 items

- I hereby renew my membership and agree to comply with the annual requirements set out in FPI Regulations.
- I am aware I must complete my membership renewal by 31 March of each membership year and do the above ethics declaration. FPI will refer members who do not fulfil membership requirements timeously, make late payment, fail to update their member data, withhold information, or provide false information, inter alia, to its Conduct and Ethics Committee.
- I now have an opportunity to apprise myself of the most recent versions of FPI Regulations which I know to be the FPI's Memorandum of Incorporation (including the Glossary and Standard Interpretation Terms), the FPI Code of Ethics and Practice Standards incorporating the FPI Regulations of Professional Conduct, the FPI Membership Regulations, the FPI Certification Standard, the designation trademark use instructions and applicable FPI policies.
- In return for my commitment to it, FPI offers me long term membership, the privileges associated with my membership class and use of the designation I have qualified for. Additionally, FPI commits to setting and upholding standards for, as well as advocating for, my profession at all relevant authorities.
- My financial contribution to FPI is expressed as a monthly fee for entitlement to the use of those membership benefits to which I am entitled too. The preferred payment of my contribution is by way of monthly debit order which I can authorise via FPI's membership system. FPI will always allocate receipts to the oldest debt first.
- My employer or me may pay my financial contribution for the calendar year up front. If I select this payment option, the accumulative fee for the membership year must be paid up front by no later than 31 March of that year.
- If I do not authorise payment by debit order FPI may assume that I elected to pay my annualised member fees up front by no later than 31 March. The upfront fee is a debt owing by me to FPI until it is paid in full.
- I shall upload the detail of my CPD (Continuous Professional Development) compliance regularly and in sufficient detail to enable assessment of my compliance therewith. My 2021/22 CPD points must be uploaded in full by 31 May 2022 and so on. I know the FPI CPD policy is published on the website.
- I may only use my FPI designation if I am in full compliance with FPI Regulations. My member fee includes a royalty for its use and if I am not a member my designation lapses. I accept a duty to inform FPI if I am no longer compliant as well as to report instances of non-compliance by others.
- I indemnify FPI from any claims made against me based on my FPI membership or how I give publicity thereto.
- Consistent with its objectives, for the purpose of member benefits and in terms of its statutory duties or contractual obligations to me, FPI may share my basic personal information with third parties.
- My membership will remain in full force and effect until FPI accepts my resignation as member (which it may not refuse if I am in good standing and there is no disciplinary complaint against me) or if it is terminated under FPI Regulations. FPI also has the right to refuse me membership in its discretion. I do have a right to appeal such refusal.

**Digital Signature:** My statements contained herein are, to the best of my belief and knowledge, true and correct and may be verified by FPI if needed. I hereby renew my membership.  
I hereby accept the Membership Renewal Agreement.

Yes

**TERMS & CONDITIONS**

By ticking the box below, you acknowledge that you have read and accept the FPI Terms and conditions as amended from time to time.

[View T&C](#)

I accept the terms and conditions

Thank you – your member renewal is now complete

Your next steps are to make payment and update your CPD

You can obtain your Certificate under My profile – My Documents