

## Planning a brighter future: FPI launches Young Financial Planners Organisation

As part of its vision to make professional financial planning available to all South Africans, the Financial Planning Institute has launched the Young Financial Planners Organisation (YFPO), a member led FPI community. YFPO is actively seeking under-45s who work as – and aspire to work as – financial planners.

“YFPO is all about uniting and inspiring the young generation of CFP® Professionals,” says FPI CEO Lelané Bezuidenhout who explains that it will do this by bringing together FPI student, candidate and Professional Members under the age of 45 in a spirit of collective improvement. “The ultimate beneficiary of the YFPO will be the South African consumer,” adds Bezuidenhout. “Improved access to quality financial planning and professional financial advice is needed to build a better future for this country.”

### What YFPO does and how it does it

The YFPO’s overarching purpose is to professionalise financial planning in South Africa, while at the same time championing diversity and inclusion in the industry. The YFPO does this at all phases of the professional journey:

1. **Planting the seed.** Visiting schools and universities to encourage young South Africans to pursue a career in financial planning. Presenting financial planning as an attractive career option, and making clear the benefits of a career in financial planning
2. **Nurturing the seedling.** Giving support and mentorship to young financial planners entering the profession. Helping these people to become successful financial planners and encouraging them to obtain the CFP® designation.
3. **Growing together.** Providing a networking space where young financial services professionals can not only learn from one another, but also promote professional financial planning and provide invaluable thought leadership to both younger members and the wider community.

Similar to the life cycle of a plant, it is hoped that young South Africans who are inspired to become financial planners in Phase 1, will go on to first join the organisations and then to become mentors for subsequent generations of financial planners.

YFPO will not be afraid of getting its hands dirty, either. “One of the ways of improving access to quality financial planning in South Africa is to work closely with corporates to embed holistic professional financial planning as the gold standard,” says Luke Martins, the Chair of YFPO. “YFPO will impress upon the next generation of planners how much more valuable professional financial planning advice is than product-led advice.”

### Who can join?

YFPO is open to FPI Professional Members as well as Students and Candidate members. The Organisation is aimed at under-45s, although CFP® professionals who join before this age can elect to remain involved as veterans and mentors.

## **Walking the talk**

Are you passionate about the financial planning profession? And are you committed to living our values?

- Professionalism: Will you aspire to excellence in everything that you do?
- Diversity and Inclusion: Will you promote diversity and inclusion at all times?
- Client First: Will you always act in the best interest of your clients?
- Integrity: Will you always be honest, consistent and transparent?
- Fairness: Will you treat others how you would like to be treated?
- Diligence: Will you always take pride in what you deliver?

If you answered yes to these questions then the YFPO is the community for you. Visit [www.fpi.co.za](http://www.fpi.co.za) to join our online community. We look forward to planning a better future for all South Africans, together!