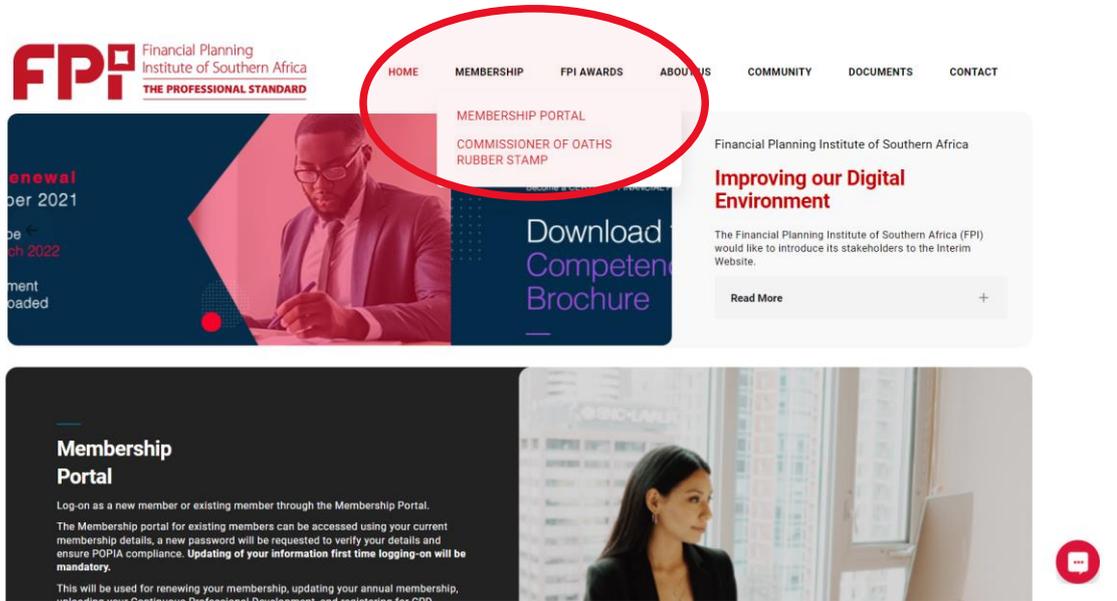


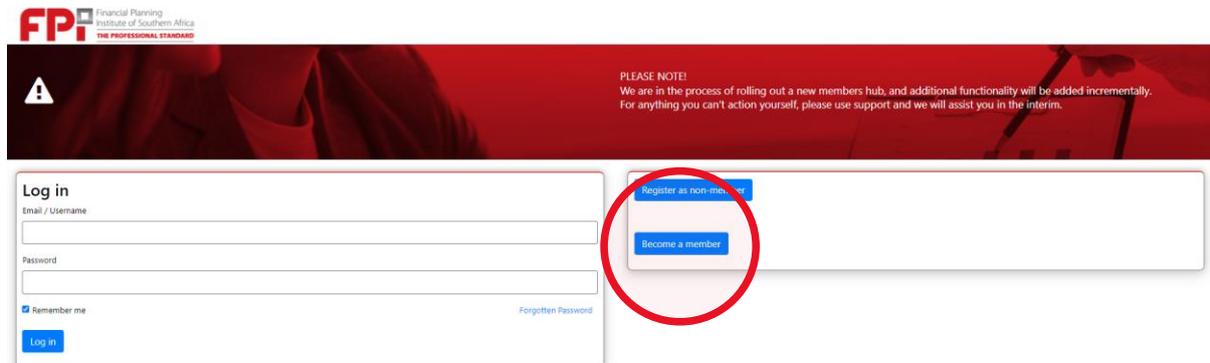
FPI Professional Competency Examinations: Registrations

Step 1: Apply for Candidate or Student membership of the FPI

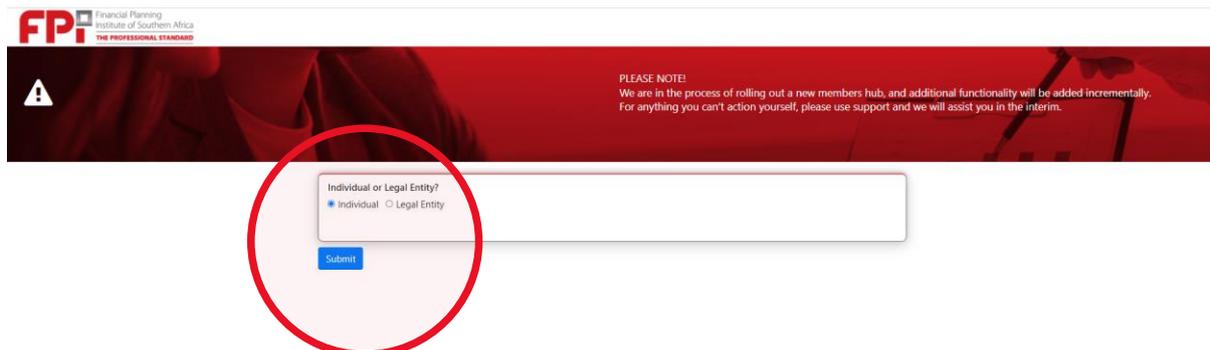
1. Open www.fpi.co.za, click on membership and membership portal.



2. Click on become a member.



3. Click on individual and click submit.



4. Choose the field applicable to you and click submit.

FPI Financial Planning Institute of Southern Africa
THE PROFESSIONAL STANDARD

PLEASE NOTE!
We are in the process of rolling out a new members hub, and additional functionality will be added incrementally. For anything you can't action yourself, please use support and we will assist you in the interim.

Are you working in the financial services?
 Yes No

[Submit](#) [Back](#)

5. If you selected YES, please choose Yes when asked if you want to apply for professional membership and press submit.

FPI Financial Planning Institute of Southern Africa
THE PROFESSIONAL STANDARD

PLEASE NOTE!
We are in the process of rolling out a new members hub, and additional functionality will be added incrementally. For anything you can't action yourself, please use support and we will assist you in the interim.

Do you want to apply for a professional designation?
 Yes No

[Submit](#) [Back](#)

6. If you selected NO in step 4 please answer the question by choosing the field applicable to you and submit.

FPI Financial Planning Institute of Southern Africa
THE PROFESSIONAL STANDARD

PLEASE NOTE!
We are in the process of rolling out a new members hub, and additional functionality will be added incrementally. For anything you can't action yourself, please use support and we will assist you in the interim.

Are you busy studying a financial degree?
 Yes No

[Submit](#) [Back](#)

- Complete your personal details on the Application screen and upload a copy of your ID document in the field provided. Press Submit and go to screen 2 at the top of the screen.

1 Application **2** Address Detail **3** T&C's **4** Finish

Title
Miss

First Name
Test

Middle Name
Test

Surname *
Macdonald

Job Title

Mobile Phone *

Email Address *

ID Type *
South African ID

SA ID number or Passport *

ID Document *
Select files...
Allowed Extensions: .doc;.docx;.txt;.rtf;.pdf;.zip;.rar;.png;.jpg;.bmp;.jpeg

Submit

- Complete your address details on screen 2 and press submit.

1 Application **2** Address Detail **3** T&C's **4** Finish

Street 1 *
Street 1

Street 2

Street 3
Street 3

City *
Johannesburg

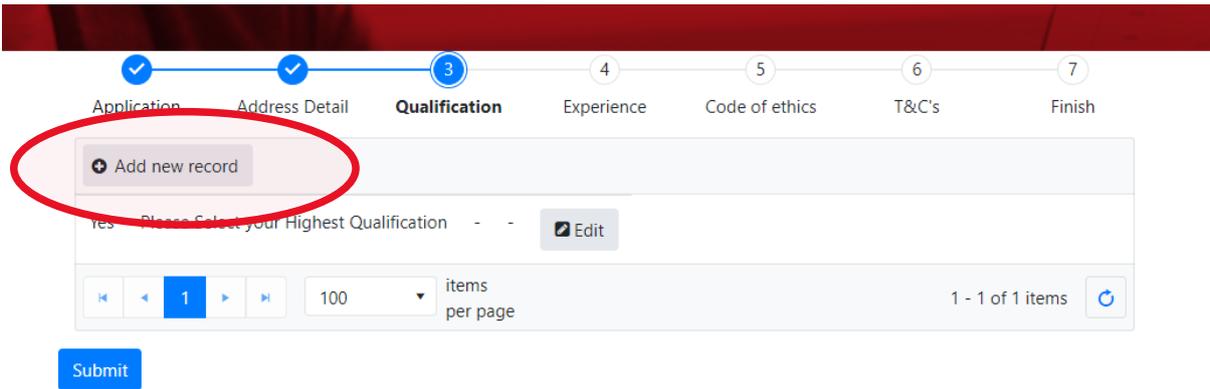
State/Province *
Gauteng

Postal Code *
1709

Country *
South Africa

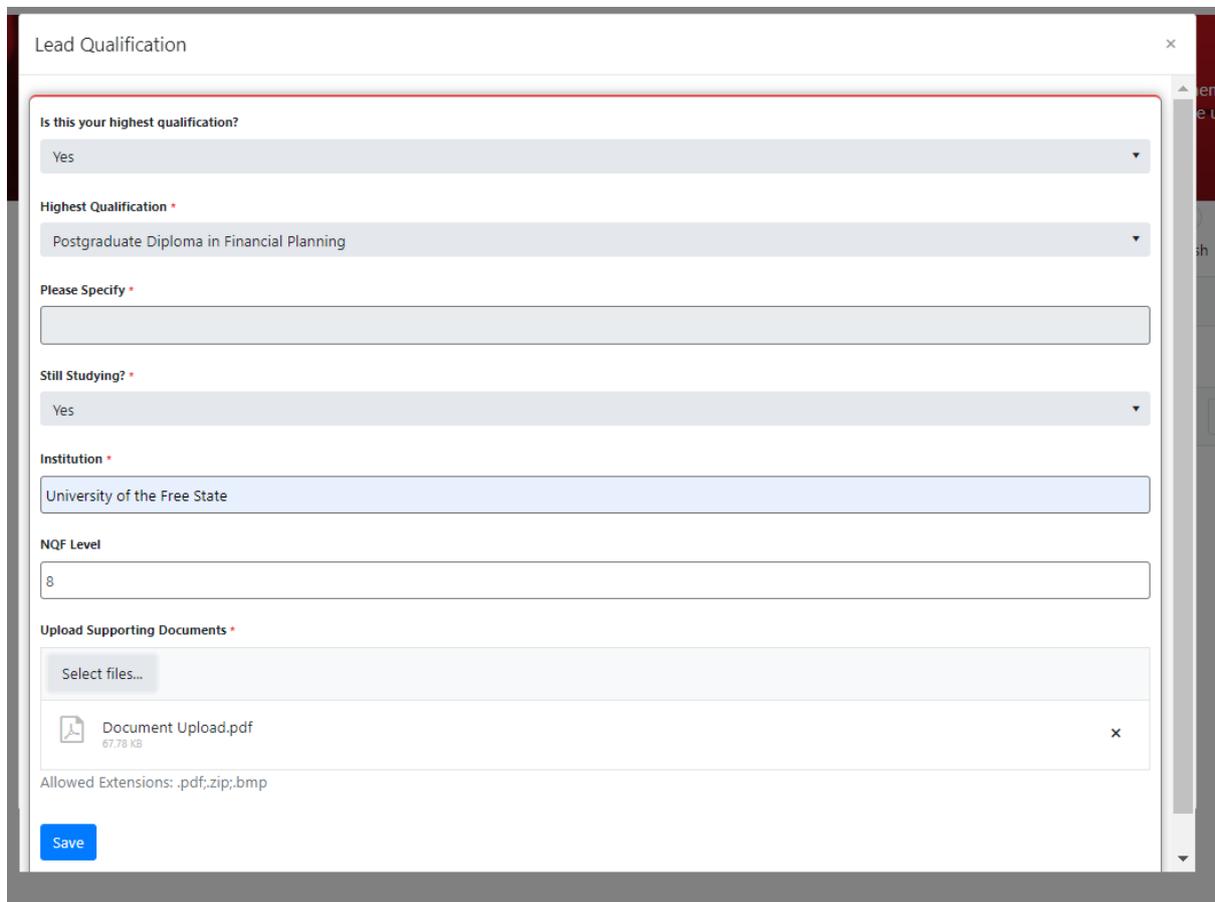
Submit

9. Move to screen 3 and click on add new record to load your qualifications.



The screenshot shows a multi-step process with seven steps: Application, Address Detail, Qualification, Experience, Code of ethics, T&C's, and Finish. Step 3, 'Qualification', is the active step and is circled in red. Below the step indicators, there is a table with one row. The first cell of the row contains a plus icon and the text 'Add new record', which is also circled in red. The second cell contains the text 'Please Select your Highest Qualification' and an 'Edit' button. Below the table, there is a pagination control showing '1' of 1 items, '100 items per page', and a 'Submit' button.

10. Add your qualification details in the pop-up screen that opens and upload proof of your qualification in the space provided. Press Save.



The screenshot shows a 'Lead Qualification' pop-up form. The form contains the following fields and options:

- Is this your highest qualification?**: A dropdown menu with 'Yes' selected.
- Highest Qualification ***: A dropdown menu with 'Postgraduate Diploma in Financial Planning' selected.
- Please Specify ***: An empty text input field.
- Still Studying? ***: A dropdown menu with 'Yes' selected.
- Institution ***: A text input field with 'University of the Free State' entered.
- NQF Level**: A text input field with '8' entered.
- Upload Supporting Documents ***: A file upload section with a 'Select files...' button. Below it, a file named 'Document Upload.pdf' (67.78 KB) is shown with a close button (x).
- Allowed Extensions**: .pdf;.zip;.bmp
- Save**: A blue button at the bottom left.

11. Once done, your qualification will reflect on screen 3. Repeat the process to load your further qualifications. Once fully completed, press submit.

The screenshot shows a progress bar at the top with seven steps: 1. Application (checked), 2. Address Detail (checked), 3. Qualification (active), 4. Experience, 5. Code of ethics, 6. T&C's, and 7. Finish. Below the progress bar is a table with two rows of qualification records. The first row has a 'Yes' checkbox, the text 'Please Select your Highest Qualification', a dash '-' in two columns, and an 'Edit' button. The second row has a 'Yes' checkbox, the text 'Postgraduate Diploma in Financial Planning', 'University of Kwazulu-Natal', and '8', with an 'Edit' button. At the bottom of the table, there are navigation arrows, a page number '1', a dropdown menu set to '100 items per page', and a status indicator '1 - 2 of 2 items' with a refresh icon.

[Submit](#)

12. Click on add new record to add details on your experience in the financial planning / financial advisory sector. Should you not have any experience, please click on submit.

The screenshot shows a progress bar with seven steps: 1. Application (checked), 2. Address Detail (checked), 3. Qualification (checked), 4. Experience (active), 5. Code of ethics, 6. T&C's, and 7. Finish. Below the progress bar is a table with one row of experience records. The first row has a red circle around the 'Add new record' button, followed by the text 'Consultant at ABC Company', 'ABC Company', 'Consultant', '2022-01-12', a dash '-', and an 'Edit' button. At the bottom of the table, there are navigation arrows, a page number '1', a dropdown menu set to '100 items per page', and a status indicator '1 - 1 of 1 items' with a refresh icon.

[Submit](#)

13. Complete the fields regarding your experience and press Save.

The screenshot shows a form titled 'Lead Experience' with a close button in the top right corner. The form contains several fields: 'Experience' (empty text box), 'Company Name *' (text box with 'ABC Company'), 'Currently Employed Here' (dropdown menu with 'Yes' selected), 'Position Held *' (text box with 'Consultant'), 'Date From *' (calendar icon and text box with 'Wednesday, 12 January 2022'), 'Contactable Reference' (text box with 'My Boss'), and 'Reference Contact Number' (text box with '012 345 6789'). A blue 'Save' button is located at the bottom left of the form.

14. Add more records as needed and submit once done.

The screenshot shows a progress bar at the top with seven steps: Application, Address Detail, Qualification, Experience (highlighted with a blue circle and '4'), Code of ethics, T&C's, and Finish. Below the progress bar is a table with one record: 'Consultant at ABC Company', 'ABC Company', 'Consultant', and '2022-01-12'. There is an 'Add new record' button and an 'Edit' button. At the bottom of the table, there are navigation arrows, a page number '1', a dropdown menu set to '100 items per page', and a refresh icon. A blue 'Submit' button is located below the table.

15. Complete the code of ethics question by clicking in the left blocks and scrolling down to answer all questions. Click on save changes. Press submit once done.

The screenshot shows a progress bar at the top with seven steps: Application, Address Detail, Qualification, Experience, Code of ethics (highlighted with a blue circle and '5'), T&C's, and Finish. Below the progress bar is a form with a 'Save changes' button (circled in red) at the top left. The form contains a table with three rows of questions. The first row is partially visible with the text 'checks.'. The second row has a 'Yes' button (circled in red) and the question: '10. Consistent with its objectives, for the purpose of member benefits and in terms of statutory obligations FPI may share my basic personal information with third parties.'. The third row has a 'Yes' button and the question: '11. I understand that FPI retains the right, in its discretion, to refuse my membership application or renewal. I understand that I have the right to appeal such a refusal.'. Below the table, there is a 'Yes' button and a large text area containing a declaration: 'I have read, understand and agree to the content of the above Declaration and Certification Agreement and confirm that my statements contained therein are, to the best of my belief and knowledge, true and correct. Digital Signature: I accept and support the terms above as my contract with the Financial Planning Institute of Southern Africa NPC.'. At the bottom of the form, there are navigation arrows, a page number '1', a dropdown menu set to '100 items per page', and a refresh icon. A blue 'Submit' button is located below the form.

16. View the membership Terms and Conditions by clicking on the link and ticking the box to accept the T&C's. Press the submit button.

Membership Agreement

1. I hereby apply for FPI membership and agree to comply with the annual requirements set out in FPI Regulations.
2. 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.
3. 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.
4. 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.
5. 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.
6. I shall upload the detail of my CPD (Continuous Professional Development) compliance regularly and in sufficient detail to enable assessment of my compliance therewith.
7. 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.
8. I indemnify FPI from any claims made against me based on my FPI membership or how I give publicity thereto.
9. 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.
10. 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.

I have read, understand and agree to the content of the above Declaration and Certification Agreement and confirm that my statements contained therein are, to the best of my belief and knowledge, true and correct.

[View T&C](#)

I accept the terms and conditions

[Submit](#)

17. Your application has been completed. FPI will commence the assessment process.

Thank you for your application. It is being processed and the FPI team will be in touch with you soon. Should you have any queries, contact us via email at businessdevelopment@fpi.co.za or phone us at 011 470 6000.

[Go back to the homepage](#)

Step 2: Register for the examination

1. Once accepted as a member you will receive an invite email with a link to the portal. Click the link and set your password on the screen.
2. Go to www.fpi.co.za and click on the Member Portal link as in step 1 above.
3. Log into the member portal with your email address and password. After you have logged in you will see the following screen:

The screenshot shows the FPI Member Portal profile page. The header includes the FPI logo and navigation links for 'Visit Main Website' and 'Logout'. A 'PLEASE NOTE!' banner is present. The main content area is divided into tabs: Profile Summary (selected), Personal Details, Contact Details, Professional Details, Experience, and Public Information. The Profile Summary tab contains sections for Membership Details, Personal Details, Contact Details, and Public Information. The left sidebar lists various user options, with 'Events' circled in red.

MEMBERSHIP DETAILS

Member Number: 19017

Membership Type: Candidate

Completion CPD status preview: Non Compliant

PERSONAL DETAILS

Title: Miss, First Name: Test, Middle Name: Test, Surname: Macdonald, Initials: , Date of Birth: , SA ID Number or Passport: , Known as:

CONTACT DETAILS

Email Address: nicimacdonald@gmail.com

Cellphone Number: 0737295102

Physical Address: , Delivery Address: , Billing Address: Street 1, Street 2, Johannesburg 1709

PUBLIC INFORMATION

Show my information on the Let's Plan Website

I'd like to use the contact details on record

4. Click on events in the menu on the left. Search for examinations in the search function on the right. Click on view details for the examination you want to register for.

The screenshot shows the FPI Member Portal events page. The header is identical to the previous screenshot. The main content area displays a search bar with 'exam' entered and 'Search' and 'Clear' buttons. Below the search bar is a 'PLEASE NOTE!' banner. The main content area is divided into a grid of event cards. The left sidebar lists various user options, with 'Events' circled in red.

Event/Exam for terminal(s)

Please Note: Should you reside outside South Africa and pay in a foreign currency, VAT will be excluded on CHECK OUT.

exam Search Clear

10 & 11 March 2022 - CFP PCE EXAM

SEMINAR DETAILS

Date: Thursday, 10 March 2022

Time: 09:00

Cost: R3 430,00 (VAT included)

View Details

CFP PCE Exam - 14 & 15 June 2022

SEMINAR DETAILS

Date: Tuesday, 14 June 2022

Time: 09:00

Cost: R3 430,00 (VAT included)

View Details

CFP PCE Exam - 22 & 23 September 2022

SEMINAR DETAILS

Date: Thursday, 22 September 2022

Time: 09:00

Cost: R3 430,00 (VAT included)

View Details

CFP PCE Exam - 22 & 23 September 2022

SEMINAR DETAILS

Date: Thursday, 22 September 2022

Time: 09:00

CFP PCE Exam Rewrite Case study 2 - 11 March 2022

SEMINAR DETAILS

Date: Friday, 11 March 2022

Time: 09:00

CFP PCE Exam Rewrite Case study 2 - 11 March 2022

SEMINAR DETAILS

Date: Friday, 11 March 2022

Time: 09:00

5. Click on register for this event.

No Data Available

Description

- By registering for this examination you agree to comply with all FPI regulations.
- Only candidates who meet the underlying education requirement will be allowed to register for this examination.
- Registrations will close two weeks before the examination date.
- Examinations are conducted online via a proctoring platform.
- Once candidates are registered for the examination, they will receive access to the PCE support portal and PCE community.
- In addition to the study material found in the PCE support portal and PCE community, the following learning material is prescribed:
 - Financial Planning Handbook (latest version)
- A candidate's employer can contact INSETA to obtain funding for the candidate to write the examination. INSETA can be contacted at 011 381 8900 or email to workshopprogrammes@inseta.co.za
- Familiarise yourself with the requirements of the examination by downloading the following documentation:
 - Professional Competency Examination Policy
 - Financial Planner Competency Profile
 - Financial Planner Curriculum Framework
 - Financial Advisor Competency Profile & Curriculum Framework
 - FPI Code of Ethics and Professional Responsibility
- Contact us at certification@fpi.co.za or telephone 011 470 6000 if you have any queries.

Register for this event

6. Choose your billing address and payment type. Should you choose EFT, the invoice will generate and you will have to pay the invoice manually. If you choose online, you can pay via online EFT or credit card.

Billing address

Street line 1: Street 1

Street line 2: Street 2

Street line 3: Street 3

City: Johannesburg

Postal Code: 1709

Country: South Africa

Province: Gauteng

Other: Other region

Payment type

Payment Method: Online

PayU

You will be redirected to PayU to pay using your credit card or EFT

Next

- **If you need your invoice to be paid by your employer, you will have to contact your employer's corporate administrator to assist in generating an invoice on your behalf.**

7. Once FPI receives your payment you will be loaded to the learning portal and CPD community.

Should you have any queries please contact us at certification@fpi.co.za or 011 470 6000.