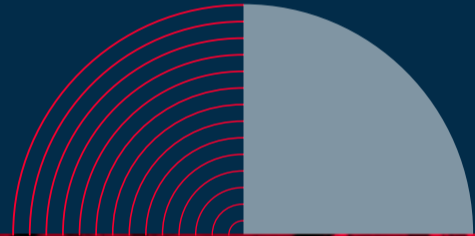
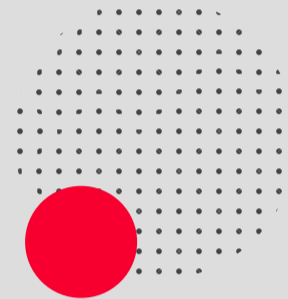


# The Financial Planning Institute Membership Value Proposition

Professional Financial Planning and Advice for all





# 01.

## Membership Value Proposition

Financial Planning Institute of Southern Africa

# With your membership, you have access to the following:



Community



Tax  
Practitioner



Consumer  
Awareness



Representation



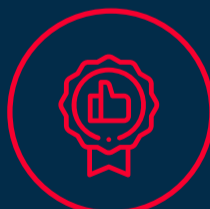
Your Membership  
Resources



CPD



Discount  
Programme



A SAQA recognised  
professional  
designation

# With your membership, you have access to:



## Registered Professional Designations

The Financial Planning Institute (FPI) offers three SAQA registered designations. The RFP™, FSA™, and CFP®. FPI professional members are entitled to use their FPI Professional designation. The RFP™ and FSA™ designations are specifically for professional financial advisers and the internationally recognised CFP® professional designation is for Financial Planners.



## Institutional Representation

The financial planning and advice profession is going through significant change at the moment. Via robust stakeholder engagement FPI represents the collective views of its members through our Advocacy and Public Policy arm, to bodies such as the Financial Sector Conduct Authority (FSCA), Council for Medical Schemes, South African National Treasury, South African Revenue Service (SARS), and the South African Reserve Bank, South African Qualifications Authority (SAQA) and quality councils, the Insurance Sector Education and Training Authority's (INSETA).



## Competency Committees

Demonstrate a higher standard through interaction with the Competency Committees who constantly shape the ongoing requirements of the industry. Through our volunteer Competency Committees, we are constantly reviewing what is needed to practice as a financial planner or financial adviser, and are developing templates and resources such as our Transition to Fee-Based Guide to assist members in implementing best practice.



## Code of Ethics and Practise Standards

The FPI Code of Ethics and Practices Standard is another way for members to set themselves apart. Our guidance and member resources are there to help you best utilise this benefit. The adherence to the code of ethics demonstrates a higher standard and accountability ensuring that it demonstrates a higher standard and accountability to your clients.

# With your membership, you have access to:



## Community Networking

One of the key aspects of becoming a member is joining a community of like-minded professionals. FPI offers interaction online through the FPI Community Platform, regional networking events, and face-to-face Continuous Professional Development (CPD) events. The sharing of trends and latest information not only allows you to stay up to date and be informed in the industry but also ensures you stay relevant with the ever-changing trends. This also gives you access to leaders and industry shakers in the community.



## Value Benefits

FPI has negotiated discounts with various publications and industry participants, such as Astute Financial Services Exchange, for members. FPI is constantly reviewing this program to add additional discounts that are important to members being able to conduct their business. As a professional member of FPI, you also receive BlueChip and Pensions Africa magazines which are complimentary.



## Continuous Professional Development

FPI understands that CPD can be time-consuming and difficult to find. FPI developed CPD programmes and activities aligned to both the Financial Adviser and Financial Planner Curriculum, Competency Profiles, and FPI Code of Ethics & Practice Standards enabling you to obtain CPD verifiable hours across technical, general and ethics & practice standards categories. FPI provides members with up to 45 complimentary CPD online hours so you can meet your FPI and Regulatory CPD requirements at your own time. In addition, FPI provides discounted face-to-face events to professional members. The events are world-class and allow for robust peer-to-peer engagements and catch-up with some thought leaders in the profession.

# With your membership, you have access to:

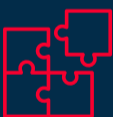


## Affiliations

**FPSB:** FPI is an affiliate of the FPSB and the only licence holder of the CFP mark in Southern Africa.

**SARS:** FPI is a Recognised Controlling Body (RCB) of SARS. This means that FPI Professional Members can apply to FPI to become a tax practitioner at no additional cost.

**SAQA:** FPI is a SAQA Recognised Professional Body which means that our designations are all registered on the National Learner Record Database (NLRD) and that we can approve CPD programmes as per the FSCA regulations.



## Relevance

FPI sets the Professional Standard for Professional Planning and Advice for all to ensure that your skills as a professional member of FPI remains relevant.



## Advocacy

One of FPI's strategic priorities is to create awareness to the public. To educate the public about financial planning and advice and why consumers should look for an FPI Professional member to be their guide on their journey. FPI runs a robust social media, brand ambassador and financial education program that is supported by our members to help spread the word.



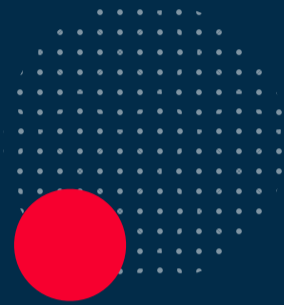
## Mentorship Programme

As an FPI Professional member, you can become a mentor to upcoming professionals and earn you CPD points in the process.



## Pro-bono Programme

As an FPI Professional Member, you can be part of the FPIMYMONEY123™ programmes and initiatives. FPIMYMONEY123™ is the consumer education division of the FPI. As a facilitator for FPIMYMONEY123™ you can earn pro-bono CPD hours and in so doing build your profile.



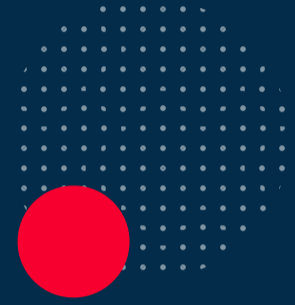
02.

# Who is this membership for?

Membership Value Proposition



01



## CPD Affiliate

### Who should apply?

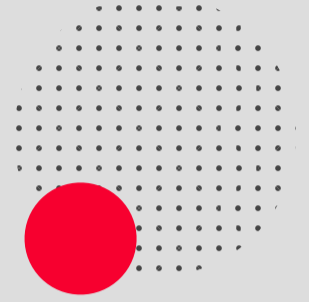
The CPD Affiliate membership is for individuals who are required to source their own CPD hours. The CPD Affiliate membership provides access to webinars so that you can meet your regulatory obligations with professional standard CPD and seamlessly report your progress to your Financial Service Provider (FSP).

### The Criteria

The CPD Affiliate membership type is for Licensed Financial Service Providers, Representatives, and Key Individuals who are required to meet the CPD requirements outlined in Board Notice 194/2017.



02



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# Student

## Who should apply?

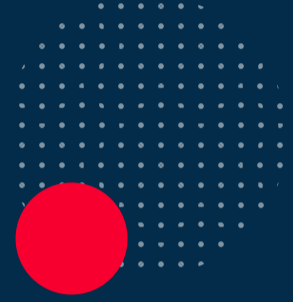
For individuals who are currently studying financial planning or advice, but not yet working in financial services. The FPI student membership provides a community so that you can connect with peers and mentors and have access to the FPI career centre.

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## The Criteria

A person who studies the disciplines of Financial Planning or Advice at a tertiary institution in either a full-time or part-time capacity while not employed in the Financial Sector.

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# Candidate

## Who should apply?

For individuals who are currently working in financial services and are on the pathway to a designation. The FPI Candidate membership provides a community so that you can connect with peers and mentors to help on your journey to a designation.

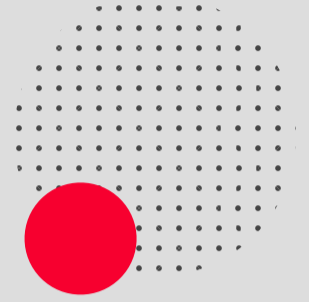
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## The Criteria

An individual who is currently employed in the Financial Sector and is working towards their experience requirement for membership. The person may either already hold their qualification or concurrently working towards applying for the designation.

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04



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# REGISTERED FINANCIAL PRACTITIONER™

## Who should apply?

For individuals who are qualified and have one year or more relevant financial services experience. FPI offers the REGISTERED FINANCIAL PRACTITIONER™ Designation so that you can differentiate yourself through the FPI Code of Ethics and Professional Standards.

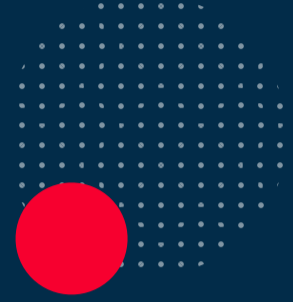
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## The Criteria

This membership type is for an individual who has:

- Completed a level NQF5 (old) or level NQF6 (new) qualification;
  - Has one (1) year relevant financial services experience or more;
  - Has completed the professional competency examination (written or exempt); and
  - Has agreed to abide by the FPI Code of Ethics and Professional Standards.
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05



# FINANCIAL SERVICES ADVISER™

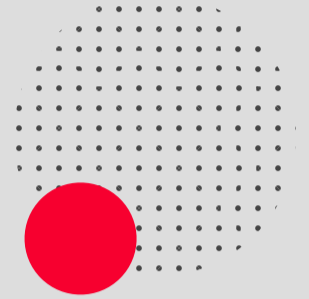
## Who should apply?

For Financial Advisers who have two (2) years or more relevant financial services experience. FPI offers the FINANCIAL SERVICES ADVISER™ Designation so that you can differentiate yourself through the FPI Code of Ethics and Professional Standards.

## The Criteria

This membership type is for a person who has:

- Completed a level NQF6 (old) or NQF7 (new) qualification;
- Has two or more years financial services experience;
- Has completed the professional competency examination (written or exempt); and
- Has agreed to abide by the FPI Code of Ethics and Professional Standards.



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# CERTIFIED FINANCIAL PLANNER®

## Who should apply?

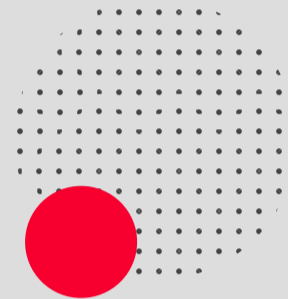
For Financial Planners who offer clients financial planning, we offer the CERTIFIED FINANCIAL PLANNER® designation, so that you can differentiate yourself through a higher competency level as well as the FPI Code of Ethics and Professional Standards.

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## The Criteria

This membership type is for a person who has:

- Completed a level NQF8 qualification;
  - Has three (3) years financial services experience or more, or completed FPI mentorship programme;
  - Has completed the professional competency examination; and
  - Has agreed to abide by the FPI Code of Ethics and Professional Standards.
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# 03.

## Membership Benefits

Membership Value Proposition



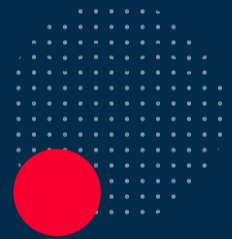
# Membership Benefits

Benefit	CPD Affiliate	Student	Candidate	RFP™	FSA™	CFP®
Webinar Programme	✓			✓	✓	✓
Face to face discounts				20%	20%	20%
Online community of peers	✓	✓	✓	✓	✓	✓
CPD Register	✓			✓	✓	✓
Resource Centre		✓	✓	✓	✓	✓
Mentor-Mentee Match		✓	✓	✓	✓	✓
Career Centre		✓	✓	✓	✓	✓
Representation at regulators				✓	✓	✓
Consumer Awareness				✓	✓	✓
Code of Ethics				✓	✓	✓
Tax Practitioner				✓	✓	✓
SAQA recognised designation				✓	✓	✓
Member discount programme				✓	✓	✓
Commissioner of Oaths						✓
Voting Rights					✓	✓
International affiliation through FPSB						✓





Professional Financial Planning and Advice for all



# Get in touch with us today

**New Members:**

[businessdevelopment@fpi.co.za](mailto:businessdevelopment@fpi.co.za)

**Current Members:**

[membership@fpi.co.za](mailto:membership@fpi.co.za)

**Contact us:**

+27 11 470 6000

**Visit our Website:**

[www.fpi.co.za](http://www.fpi.co.za)