

## REQUIREMENTS FOR ISSUING A CRITICAL SKILLS LETTER

In line with the South African Critical Skills List of 2023 and the list of Occupations in High Demand, a person can apply to FPI to issue a critical skills letter to accompany a critical skills visa application.

FPI will only issue a critical skills letter to designated members of FPI in good standing who have proved that they possess the necessary qualification, skills and experience needed in order to fulfill the obligations of any of the occupations listed below.

### OFO Codes and Definitions of Occupations

FPI will issue critical skills letters in line with the competencies needed for the following OFO codes:

241203 – Investment advisor – Advises clients in respect of securities and other financial investments and instruments (NQF level 8 qualification required).

### Critical Skills letter process

A prospective applicant needs to apply to FPI for professional membership of any of the following designations:

- 1) CERTIFIED FINANCIAL PLANNER®
- 2) FINANCIAL SERVICES ADVISOR®
- 3) REGISTERED FINANCIAL PRACTITIONER®

The criteria for professional membership is available on FPI's website – [www.fpi.co.za](http://www.fpi.co.za)

Once the applicant has met the criteria of FPI for professional membership and is approved as a designated member, the member can request a Critical Skills letter from FPI, at a cost of R100 + VAT.

A critical skills letter will only be issued to a designated member of FPI in good standing, with the following additional criteria.

- The member needs to ensure that their experience and education history is complete and up to date on the FPI member portal.
- Copies of all qualifications need to be uploaded to the FPI portal.
- Critical skills letters will only be issued to designated members of FPI who hold a qualification at NQF level 8 or above.
- If a qualification was not obtained in South Africa, a SAQA Foreign Qualifications Verification needs to be provided to FPI.
- For a member to be considered to be in good standing, the following criteria need to be met:
  - o Annual membership fees must be settled in full prior to the issuance of a critical skill letter.
  - o The member must be CPD compliant for the previous CPD cycle.
  - o The member must meet the criteria as stipulated in the FPI Code of Ethics.

#### List of Professional Bodies in South Africa

Should your skills and education not align with the FPI membership requirements, you can find the correct professional body for your skills and education on SAQA's website at <https://pbdesig.saqa.org.za/>

In order to start this process send an email to [certification@fpi.co.za](mailto:certification@fpi.co.za) or phone us at 011 470 6000.