



Building Better Futures



The Financial Planning Institute Membership Value Proposition

Building Better Futures through Trusted Professional
Financial Planning



info@fpi.co.za



+27 11 470 6000



www.fpi.co.za

Unlock your FPI Membership Benefits

As a professional member of the Financial Planning Institute of Southern Africa NPC (FPI), you gain access to a wide range of professional membership benefits, tailored to support your career growth, uphold the highest ethical standards, and empower your practice. Here's how your membership can transform your professional journey:



Exclusive Offers & Discounts

- > **Accredible:** Complimentary digital credentialing to showcase your professional achievement with confidence.
- > **Astute:** Discounted rates for seamless data integration, enhancing your workflow.
- > **Blue Chip Magazine:** Complimentary access to relevant industry content and thought leadership.
- > **Commspace:** Enjoy a 10% discount for the first 12 months on Revenue Management Solutions.
- > **Due Diligence SA:** Complimentary access to due diligence reports for investment managers. Register at duediligencesa.co.za.
- > **FPI My Money 123:** Consumer awareness materials available to educate and engage your clients.
- > **LexisNexis:** Complimentary access to critical national legislation and regulatory resources through the FPI portal.
- > **Profile Media:** Complimentary online access to the Unit Trust Handbook, essential for financial planning.
- > **Rubber Stamps SA:** Discounted rubber stamps for CFP® professionals who are Commissioners of Oaths.
- > **Research Access:** Benefit from exclusive insights, such as FPI and FPSB's industry research and surveys.



Exclusive Offers & Discounts Cont.

- **Gravitas Tax:** A leading tax directive simulation tool trusted by financial advisers across South Africa. In alignment with our mission to empower the financial planning profession with accessible and compliant tax planning technology, we are offering FPI CFP® professionals an exclusive access package.



Global Recognition & Professional Standards

- **Affiliation with FPSB:** Connect with a global network of over 223,700 CFP® professionals, upholding international standards.
- **Commissioner of Oaths:** As a CFP® professional, gain ex-officio status, allowing you to administer oaths and certify documents.
- **Ethical Guidance:** Access resources to navigate complex ethical dilemmas, reinforcing trust with your clients.
- **Find a Financial Professional:** Enhance visibility by listing your services on the My Money 123 directory.
- **Letter of Good Standing:** Easily request a letter through the FPI portal to confirm your compliance and membership status.
- **Registered Designations:** FPI offers SAQA-recognized designations (RFP®, FSA®, CFP®), affirming your expertise and professional standing. By fulfilling the compliance requirements of your designation, you gain independent and authoritative certification of your professional competence and authority to use the registered trademark thereof in connection with your services.
- **Tax Practitioner:** As an FPI professional member, register with SARS as a Tax Practitioner through FPI, a Recognised Controlling Body (RCB), simplifying the registration process and ensuring compliance with all requirements.





Professional Development & Collaboration

- **Continuous Professional Development (CPD):** Obtain up to 45 complimentary CPD hours annually through webinars, workshops, and online master classes, aligned with FPI's Code of Ethics & Practice Standards.
- **Online member community:** Join an online member community and share your or the experiences and insights of fellow professionals.
- **FPI Annual Professional's Convention:** Receive member-exclusive rates at this leading financial planning event, featuring world-class speakers and networking opportunities.
- **In-Person Events:** Join fellow professionals at face-to-face gatherings, such as the Annual Refresher and other regional sessions.
- **Mentorship Programme:** Earn CPD points while mentoring upcoming financial planners and fostering professional growth.
- **Peer-to-Peer Collaboration:** Participate in monthly online sessions and engage with leaders and trendsetters in financial planning.
- **Younger Financial Planners Organization (YFPO):** Access tailored support and resources for early-career professionals.
- **FPI Volunteer Committees:** By joining an FPI governance or competency committee, you have the opportunity to collaborate with fellow professionals in shaping the future of our profession and the professional body.
- **FPI Education and Training Trust:** This trust was established to advance the development of new professionals and to promote academic studies in financial planning. It offers opportunities to benefit from its initiatives and to contribute both financially and intellectually to the growth of our profession.



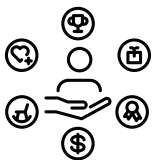
Advocacy & Representation

- **Institutional Representation:** FPI advocates on your profession's behalf to regulators like FSCA, SARS, National Treasury, FIC and SAQA, representing your interests in policy and regulatory developments.
- **Have Your Say:** Influence industry changes by participating in discussions and providing input on new legislation and regulations.
- **Consumer Awareness:** Contribute to FPI's robust campaigns, educating the public on the value of financial planning.



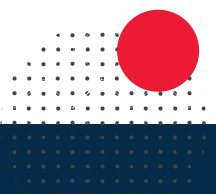
Recognition & Awards

- **Prestigious Awards:** Compete for titles like *Financial Planner of the Year* and *Candidate of the Year*. Celebrate excellence at the annual gala, with additional honours like the *It Starts with Me Award* and *Diversity and Inclusion Award*.



Intangible Benefits

- **Client Trust:** Boost client confidence through your professional designation and adherence to ethical standards.
- **Disciplinary Assurance:** Assurance of FPI's commitment to maintaining the profession's integrity through rigorous disciplinary measures.
- **Employability:** Enhance your career prospects with a designation recognised locally and globally.
- **Professional Differentiation:** Stand out in the industry by demonstrating a commitment to superior professional standards. Use your professional designation in your branding.



Join the FPI Community

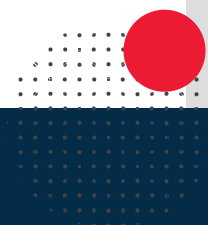
Become part of a network committed to professional excellence, ethical financial planning, and continuous growth. Visit the FPI member portal to unlock your full membership potential today!

Benefit	Student	Candidate	RFP®	FSA®	CFP®
Accredible (Digital Credentialing)					✓
Astute (Discounted Data Integration)			✓	✓	✓
Blue Chip Magazine (Complimentary Access)	✓	✓	✓	✓	✓
Commspace (10% Discount for 12 Months)			✓	✓	✓
Due Diligence SA (Complimentary Access)	✓	✓	✓	✓	✓
FPI My Money 123 (Consumer Awareness)	✓	✓	✓	✓	✓
LexisNexis (Complimentary Access)			✓	✓	✓
Profile Media (Unit Trust Handbook)			✓	✓	✓
Rubber Stamps SA (Discounted Rates)					✓
Commissioner of Oaths					✓
Research Access	✓	✓	✓	✓	✓
Global Recognition (FPSB Affiliation)					✓
Ethical Guidance & Code of Ethics	✓	✓	✓	✓	✓
Find a Financial Professional Listing			✓	✓	✓
Letter of Good Standing			✓	✓	✓
CPD Register			✓	✓	✓
Complimentary CPD Webinars			✓	✓	✓
Annual Professional's Convention Discounts			✓	✓	✓
In-Person Events & Networking Discounts			✓	✓	✓
Mentorship Programme (mentor or mentee)	✓	✓	✓	✓	✓
FPI Professional Member peer-to-peer Collaboration			✓	✓	✓
YFPO peer-to-peer Collaboration (younger than 40)			✓	✓	✓
Advocacy for profession			✓	✓	✓
Consumer Education Initiatives (pro-bono)			✓	✓	✓
Recognition & Awards		✓	✓	✓	✓
Client Trust & Professional Differentiation			✓	✓	✓
Employability & Disciplinary Assurance			✓	✓	✓
Voting Rights				✓	✓

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Benefit	Student	Candidate	RFP®	FSA®	CFP®
Tax Practitioner			✓	✓	✓
Resource centre (per community)	✓	✓	✓	✓	✓
SAQA Recognised Designation			✓	✓	✓
Gravitas Tax					✓



Professional Financial Planning and Advice for all

Get in touch with us today

New Members:

businessdevelopment@fpi.co.za

Current Members:

membership@fpi.co.za

Contact Us:

[+27 11 470 6000](tel:+27114706000)

Visit our website:



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