

An update from the FPI



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Reflecting on Q1 of 2023 made me realise yet again that time does not stand still and that we need to make the best of each day. With so much to do on a daily basis, it is important to have the right team with the right support to deliver on our vision, which is Professional Financial Planning and Advice for all.

I want to dedicate this article to the team at the Financial Planning Institute of Southern Africa (FPI) and the ± 200 volunteer professional members who are moving the FPI forward on a daily basis.

Adele Whyte, as the Head of the Membership Hub, has been instrumental since 2019 in delivering on the value proposition to our members. She is also responsible for the development of Continuous Professional Development (CPD) programmes at the FPI. I am sure you will agree with me that the events that we saw in Q1 have been of world class quality. Some of the programmes that have been delivered to date this year are:

2023 Annual Refresher

The Annual Refresher was a great success with fantastic speakers such as Wessel Oosthuizen, Errol Mayer, 2022 FPI Financial Planner of the Year Palesa Dube and David Kop who left us all refreshed with new and/or updated knowledge. We had a full house in all the regions, bar Pretoria.

Those who missed the in-person event joined the online event on 15 March 2023. And if you missed the Annual Refresher event altogether, you can still register for the recordings and earn your verifiable technical CPD hours.

2023 Budget review

This year was the first time we hosted the Budget Review on our own and not in collaboration with the South African Institute of Taxation (SAIT). This event was (and still is) complimentary to FPI members and we had over 500 members registered for the event. We received excellent reviews for both speakers, Ronald Matande and Ronald King.

2023 Estates and trust workshop

This workshop was attended by more than 500 FPI professional members. Professor Fatima Osman covered legal developments and implications for estate planning. Louis van Vuren covered recent developments in trusts and discussed recently inked court cases that apply to a financial planning perspective. David Thomson and Renate Jute joined a panel discussion on Practical Pitfalls in Estate Planning which was moderated by Nici Macdonald. Again, if you missed the live online session, please register for the recordings in order to still earn your technical CPD points.

An update from the FPI

2023 FPI Professionals convention

This year's convention is at the Sandton Convention Centre on 14 and 15 November 2023. Now that the Covid-19 induced lockdowns have come to an end, and our future outlook has changed due to all the disruptions of the past three years, we are BACK TO THE FUTURE! It is therefore no surprise that our theme for this year's convention is BACK TO THE FUTURE. The convention will focus on what this looks like from a practice management point of view, people point of view (clients and financial professionals) as well as technology / AI. We will also look at ESG (three

Membership renewal

The FPI membership consultants have been working around the clock to assist members with membership renewal. With the new customer relationship management system, renewing your membership has never been this easy.

Competency committees

A massive thank you to the professional members involved in FPI competency committees. It is with your support that we are able to host peer collaboration sessions, provide robust input into regulatory responses and provide CPD content and programmes that are relevant to FPI members.

From a certification point of view, I want to celebrate Nici Macdonald, the Head of Certification and Standards. It is under Nici's leadership that the professional competency examination ran as smooth as possible, considering the loadshedding challenges, during March. Nici was furthermore instrumental in ensuring that the FPI participates in the Financial Planning Standard Boards (FPSB) job analysis survey during 2020. The outcome of the global job analysis survey had a direct impact in the recent update and release of the FPSB Global Standards.

the updated Financial Planning Curriculum and Practice Standards are localised in South Africa by January 2025. She has also been instrumental since November 2022 in updating the FPI MyMoney123 Consumer Education programme and material in collaboration with FPI volunteers and the FPI marketing department.

From an operational point of view, I want to thank and celebrate Ronald Matande, who has been instrumental in assisting me with operational matters in order to free me up to spend more time on FPI Business Development, Advocacy and Stakeholder Engagement.

If you have not seen the FPI's new website, please go to www.fpi.co.za now and enjoy the new look and feel. We will continue to populate some of the content in the spaces where we have made provision for thought leadership for instance. Comments on the new website are, as always, welcome. You are welcome to pop me an email at CEO@fpi.co.za.

The above initiatives are just some of the many good things going on at the FPI. As our focus and strategy is on growth and awareness, you will see more happening from a campaign point of view, as well as the FPI Studio which will kick off in Q2. The FPI Studio will be instrumental in creating awareness around the financial planning profession via channels like YouTube, LinkedIn, live interviews with FPI members, consumers, subject matter experts and regulators, to mention but a few.

In closing, if you want to nominate anyone for one of the FPI's prestigious awards, please do so as soon as possible. All the details are on the FPI's new website.

All of the best
Lelane

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world of change