



FPI

Financial Planning
Institute of Southern Africa

THE PROFESSIONAL STANDARD

*FPI Approved
Professional
Practice™*



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**Professional
Practice™**

www.fpi.co.za

Vision

Professional financial planning for all.

Our Mission

The FPI's mission is to advance and promote the pre-eminence and status of financial planning professionals, while at all times acting in the interests of the society (community, constituency) whom the profession serves, by:

1. Improving the quality and accessibility of professional financial planning for all in Southern Africa.
2. Acting as advocate for professional financial planning, building a recognition of the importance and need for such planning by the general public.
3. Providing a framework within which members can achieve qualifications and maintain competence to create greater value for their clients, practices and employers.
4. Ensuring that members maintain the highest ethical standards in the pursuance of their profession.
5. Providing a leadership role within financial services by providing balanced, credible input and commentary to government and the public.
6. Facilitating transformation within the profession.

By implementing our mission, we enable CERTIFIED FINANCIAL PLANNER® professionals to provide a service of the highest excellence to their clients that are underpinned by clear and defined standards.

The professional status of our members are elevated on many levels; not only do they stand out in a group of financial advisors who do not carry the designation, but they can confidently deliver their services with the highest standards in terms of knowledge, expertise and ethical conduct.

Being an *FPI Approved Professional Practice*™ makes your business stand out amongst its peers and sends a clear message to your clients that your practice adheres to the highest levels of standards and ethics. It also validates that your practice is following the six step financial planning process and that you place the needs and objectives of your clients at the heart of your business.