

Embracing Change - a key theme ahead of FPI Professionals Convention

The Financial Planning Institute of Southern Africa (FPI) will be hosting its annual FPI Professionals Convention that will see a number of experts gathering to discuss ways to advance the financial planning profession whilst ensuring quality service.



Godfrey Nti

This year's convention, themed 'Embracing Change' will be held at the Sandton Convention Centre in Johannesburg from 24-25 June 2015. During the two-day convention, financial professionals and inspirational speakers will discuss important industry specific topics such as the Retail Distribution Review (RDR), the Financial Sector Regulation (FSR) bill and the financial planning profession while also focusing on consumer risk profiling and South Africa's savings culture.

Godfrey Nti, FPI CEO added that, "In order to move forward with the changing times, professionals will need to adapt and familiarise themselves with new ways of operating to ensure that they are always giving their client the most superior service. Hence this year's convention's aim is to bring clarity and guidance regarding the future of the financial planning profession."

One of the key aspects of change that has emerged in the financial planning profession is the transition to a fee-based practice. David Kop, CFP®, Head: Advocacy and Consumer Affairs at FPI will introduce a toolkit that will cover pricing strategies, provide guidance on drafting a value proposition and assist with client segmentation, as well as the necessary templates.

As part of the discussions, delegates gain insight on the benefits of and ways to overcome the challenges associated with fee-based practices.

In addition, 'Cyber Threat' will feature as a key topic of discussion following the numerous cyber-attacks on key businesses

and organisations in the past year. This discussion will open the dialogue about the importance of keeping clients' files and data safe, especially when placed online.

All professionals in the financial services industry are encouraged to attend the convention to learn and share with their peers in order to further advance themselves, the profession and industry.

To register for this year's convention, go to www.fpi.co.za, contact the convention team on (031) 268-3255/3052 or email seminars@lexisnexis.co.za or marketing@fpi.co.za.

For more, visit: <https://www.bizcommunity.com>