CENTRE FOR PROFESSIONAL DEVELOPMENT

## Our CPD offerings

We deliver verified and accredited continuous professional development (CPD) events that add value and improve the knowledge and skills of all delegates who attend. The events are delivered face-to-face and online

## Individual Offerings

| Offering | Price | CPD Points |
|---|---|---|
| Class of Business | R 250 | NA |
| Full day face-to-face workshop | R 1 608 FPI member \| R2 010 non-member | Approx. 5 |
| Half day face-to-face workshop | R 924 FPI member \| R 1 155 non-member | Approx. 4 |
| Webinars | R 230 | 1.5 |
| Online courses | R 750 | 6 |
| Short online course | R 250 | 2 |

## CPD packages - For Corporates and Individual

| Package | Composition of webinar package | Annual upfront price |
|---|---|---|
| **6 CPD Point Webinar Package** | 4 webinars | R 700 |
| **12 CPD Point Webinar Package** | 8 webinars | R 900 |
| **18 CPD Point Webinar Package** | 12 webinars | R 1 100 |
| **35 CPD Point Webinar Package** | 24 webinars | R 1 300 |
| **Member Exclusive Webinar Package** | 30 webinars | R 1 200 |
| **Non-Member Exclusive Webinar Package** | 30 webinars | R 1 500 |
| **6 CPD Point Webinar and Online Package** | 1 short online course and 3 webinars | R 800 |
| **12 CPD Point Webinar and Online Package** | 1 short online course and 7 webinars | R 1 000 |
| **18 CPD Point Webinar and Online Package** | 1 short online course and 11 webinars | R 1 200 |
| **35 CPD Point Webinar and Online Package** | 1 short online course and 23 webinars | R 1 400 |

**Notes:**

- All above prices are inclusive of 15% VAT
- FPI members get 20% discount on face-to-face workshops
- FPI members, with renewed FPI membership status, get 11 free webinars

# Continuous Professional Development Events

Attend one of our workshops/seminars in order for you to get your required CPD points. Our workshops/seminars range from half day to full day.

| Date | Region | Event | Venue |
|---|---|---|---|
| 20 February 2019 | Cape Town | Budget Review Trilogy **Half Day** | FNB Portside<br>5 Buitengracht Street<br>Cape Town City Centre |
| 21 February 2019 | Durban | | FNB Acacia House<br>2 Kikembe Drive, 2nd floor<br>Umhlanga Rocks |
| 22 February 2019 | Johannesburg | | Wanderers Club<br>21 North Road<br>Illovo |
| | | | |
| May 2019 | Johannesburg | Estate & Tax **Full Day** | TBC |
| May 2019 | Pretoria | | TBC |
| May 2019 | Durban | | TBC |
| May 2019 | Cape Town | | TBC |
| | | | |
| 17 July 2019 | Johannesburg | FPI Annual Convention | Sandton Convention Centre |
| 18 July 2019 | | | |
| | | | |
| September 2019 | Johannesburg | Retirement and Investment **Full Day** | TBC |
| September 2019 | Durban | | TBC |
| September 2019 | Cape Town | | TBC |
| | | | |
| November 2019 | Johannesburg | Annual Refresher **Full Day** | TBC |
| November 2019 | Pretoria | | TBC |
| November 2019 | Free State | | TBC |
| November 2019 | Port Elizabeth | | TBC |
| November 2019 | George | | TBC |
| November 2019 | Durban | | TBC |
| November 2019 | Cape Town | | TBC |

***Dates, speakers and topics are to be confirmed depending on speaker and venue availability.***

## Continuous Professional Development Webinars

Attend one of our online continuous professional development (CPD) webinars to make it easier for you to get your required CPD points. Our webinars are one hour long with an assessment which means they offer up to 1.5 CPD points. All assessments have a 60% pass with three attempts, if all three attempts are failed CPD points won't be uploaded and you will need to re-register and pay to take the course again.

**Price: R230 per webinar**

| TOPIC | Available until | CONTENT | SPEAKER |
|---|---|---|---|
| **Business Assurance** | 10 September 2019 | Company owned policies | Sherwin Govender, CFP® |
| **Client Engagement** | 16 August 2019 | Empowering Women Through Financial Planning | Mariette Tappan, CFP®<br>Thokozani Radebe, CFP®<br>**Facilitator:**<br>Barbara Mundell, CFP® |
| **Employee Benefits** | 12 July 2019 | Industry consolidation, where is EB going? **(Employee Benefits 1)** | Andrew Crawford, CFP® |
| | 23 August 2019 | Employee Benefits Value Proposition **(Employee Benefits 2)** | Viresh Maharaj |
| **Estate Planning** | 13 September 2019 | Offshore assets and estate planning **(Estate Planning)** | Thokozani Radebe, CFP® |
| | 20 September 2019 | Testamentary Trusts **(Trust & Tax)** | Stefan Strydom, CFP® |
| | 2 August 2019 | Are trusts still relevant? **(Trust Education 1)** | Phia van der Spuy |
| | 4 October | Trust your trust **(Trust Education 2)** | |
| | 13 December 2019 | What trustees have to do, or should do **(Trust Education 3)** | |
| **Ethics** | 12 April 2019 | The ethics leadership role of the financial services professional **(Ethics 1)** | Kobus Oosthuizen, CFP® |
| | 6 December 2019 | Unpacking the Various Ombud Reports **(Ethics 2)** | Barbara Mundell, CFP® |
| TOPIC | Available until | CONTENT | SPEAKER |

| TOPIC | Available until | CONTENT | SPEAKER |
|---|---|---|---|
| General | 26 April 2019 | Economic Update 2 - The 2018 budget in context of the SA economy | Mike Schussler |
| | 30 August 2019 | Economic Update 3 - Unemployment and low returns | |
| | 22 November 2019 | Economic Update 4 - A country renewed with hope but not yet reformed. | |
| | 29 November 2019 | Update on Robo-Advice | Ronald King, CFP® |
| Healthcare Planning | 6 September 2019 | Holistic healthcare planning | Jill Larkan, CFP® |
| | 25 October 2019 | Cancer and Severe Illness **(Risk planning & health)** | Schalk Malan<br>Jill Larkan, CFP®<br>Barbara Mundell, CFP® |
| | 10 September 2019 | The merits of expanding Health Insurance in South Africa | Gail Gibson, CFP® |
| | 10 September 2019 | Update on all legislation pertaining to Health Care | |
| | 10 September 2019 | Health insurance and Demarcation regulations | |
| | 10 September 2019 | Future of health insurance cover and health care brokers | |
| | 10 September 2019 | International Health Insurance | |
| | 10 September 2019 | How are benefits costed in medical schemes | |
| | 10 September 2019 | NHI and the implications for medical schemes | |
| | 10 September 2019 | Low income market and the health insurance environment | |
| | 5 November 2019 | Is quality healthcare attainable for all South Africans? The SA reality. | |
| | 7 November 2019 | The future of the healthcare broker | |
| | 12 November 2019 | Funders and its role in health care | |
| | 14 November 2019 | Ethics and health care in South Africa | |

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|---|---|---|---|
| **Interpersonal Skills** | 5 July 2019 | The importance of financial behaviours in the financial planning process **(Interpersonal Skills)** | Alta Odendaal, CFP® |
| **Investment Planning** | 10 May 2019 | Portfolio construction **(Investment planning 1)** | Sherwin Govender, CFP® |
| | 17 May 2019 | The value of passive investments on a client portfolio **(Investment planning 2)** | Roland Grabe, CFP® |
| | 24 May 2019 | Coaching your client through tough economic times **(Investment planning 3)** | Sydney Sekese, CFP® |
| | 28 June 2019 | Financial planning for millennials **(Youth panel webinar)** | Jason Bernic, CFP®<br>Tiaan Herselman, CFP®<br>Barbara Mundell, CFP® |
| | 10 July 2019 | The A to Z of section 12J investments | Jonty Sacks |
| **Practice Management** | 3 May 2019 | Articulating and living your value **(Practice management 1)** | Wessel Oosthuizen, CFP® |
| | 18 October 2019 | Social Media Selling and Marketing Your Practice **(Practice Management 2)** | Tim Slatter |
| **Retirement Planning** | 15 March 2019 | Annuity options in South Africa **(Retirement planning 1)** | Bjorn Lodewig |
| | 19 July 2019 | Divorce orders and pension funds **(Retirement planning 2)** | Logie Govender, CFP® |
| **Short term** | 26 July 2019 | How to build and manage a short-term insurance practice | Kate Zornitta |
| | 1 November 2019 | TCF and Twin Peaks | |
| | 1 November 2019 | Short Term Insurance Act; Fais Act; RAF | |
| | 15 November 2019 | Understanding Broad Form Liability | |
| | 15 November 2019 | Overview of Engineering Insurance | |
| | 26 November 2019 | Introduction to Marine Insurance | |
| | 26 November 2019 | All you need to know about Travel Insurance | |

| | Available until | CONTENT | TOPIC |
|---|---|---|---|
| **Short term** | 6 December 2019 | How “Underwriting Management Agency” fits into Short Term Insurance | Kate Zornitta |
| | 6 December 2019 | Understanding the basics of Reinsurance | |
| **Tax Planning** | 22 March 2019 | Budget Review for 2018 | David Kop, CFP® |
| | 22 June 2019 | Tax season 2018 | Barbara Mundell, CFP® |

**Note:**

- **Please note that if a webinar has passed its live date you can still register for the recording and get access to it as well as the assessment to still claim the CPD points**
- **If you can’t make the live session you can still register and receive access to the recording the following day**

## Short Online courses

Attend one of our online continuous professional development (CPD) courses to make it easier for you to get your required CPD points. Our short online courses are approximately 2 hours long and offer 2 CPD points. Online Courses have material and an assessment, all assessments have a 60% pass with three attempts, if all three attempts are failed CPD points won't be uploaded and you will need to re-register and pay to take the course again.

**Price: R250 per course**

| Topic | Date course will open | Course name/Content |
|---|---|---|
| General | Already available | The regulatory requirements for replacements |
| | Already available | Overview of Changes in the Financial Planning Environment |
| | Already available | Cultural diversity in Financial Planning |
| | Already available | Report writing for financial planners |
| | Date to be confirmed | Fundamentals of business interruption insurance |
| Interpersonal Skills | Already available | Social Media Use - what Key Individuals should know |
| | Already available | Social Media Use for financial Planners |
| | Already available | Presentation skills for financial planners |
| Investment Planning | Already available | Tax-Free savings accounts in Financial Planning |
| | Already available | Ethical Investments |
| | Already available | Tax and Investments |
| | Already available | Offshore investments and Governance |
| | Date to be confirmed | Global Investment Strategies |
| | Already available | Investment planning and the economy |
| | Already available | Constructing a Client Portfolio |
| | Date to be confirmed | The investor and investment planning fundamentals |
| | Already available | Managing Risk in a Clients Portfolio |
| Estate Planning | Already available | Divorce and Estate Planning |
| | Already available | Marital Regimes |
| | Discontinued | Estate Planning with Offshore Exposure |
| | Already available | Estate planning: Succession planning for Businesses |
| | Already available | Trusts and Estate Planning |
| | Already available | Shari'ah Compliant Estate Planning |
| Risk Planning | Already available | Consequences of non-disclosure |
| | Already available | Risk Planning: Understanding the risk management process |
| | Date to be confirmed | Risk management considerations for a financial planning practice |
| Healthcare Planning | Already available | Medical Scheme Performance |
| | Already available | Disability cover |

CENTRE FOR PROFESSIONAL DEVELOPMENT

| Topic | Date course will open | Course name/Content |
|---|---|---|
| **Retirement Planning** | Already available | Tax deductions of retirement fund contributions |
| | Already available | Tax benefits of Retirement Planning |
| | Already available | Pre-retirement planning |
| | Already available | Post-retirement planning |
| | Already available | Retirement Planning: Tax on withdrawal |
| | Already available | Retirement Planning: Tax at retirement |
| | Already available | Retirement Planning: Tax on death |
| | Discontinued | The South African Retirement Landscape |
| | Already available | King IV and Retirement Funds |
| | Date to be confirmed | Retirement Funds and Risk Management |
| **Employee Benefits** | Already available | Umbrella funds options, including costing |
| | Already available | Section 14 Transfers: Process and Pitfalls |
| | Already available | Section 37C Disposal of Death Benefits |
| | Already available | Divorce and Retirement Fund Benefits |
| | Discontinued | Social Security and Retirement Reform |
| | Already available | Pension Fund Regulations |
| | Already available | Retirement Fund Governance |
| | Already available | Regulation 28 In-fund Investment Management |
| | Already available | Employee benefits and Dispute Resolution |
| | Already available | Employee benefits: Risk and structuring of risk benefits |
| | Already available | Employee Benefits and Client Engagements |
| | Already available | Employee benefits and Tax |
| **Business Assurance** | Already available | Tax Planning for Businesses |
| | Date to be confirmed | Investment Planning for Business owners |
| **Ethics** | Already available | Ombud's cases and ethical considerations |
| | Already available | Ethics for Financial Planners |

Note:

- All courses are open for registration however the course will be accessible after specific dates

# Online courses

Attend one of our online continuous professional development (CPD) courses to make it easier for you to get your required CPD points. Our online courses are approximately 6 hours long and offer 6 CPD points. Online Courses have material and an assessment, all assessments have a 60% pass with three attempts, if all three attempts are failed CPD points won't be uploaded and you will need to re-register and pay to take the course again.

**Price: R750 per course**

| Topic | Date course will open | Course name/Content |
|---|---|---|
| Estate Planning | Already available | Administration of deceased estates |
| | Already available | The law as it affects Estate planning and Trusts |
| | Already available | Taxation applicable to Estate planning and Trusts |
| | Discontinued | Drafting an Estate Plan |
| Employee Benefits | Already Available | Advanced Employee Benefits & Tax |
| Risk Planning | Already available | Risk Planning Products |
| | Already available | Risk and Business Assurance |
| Tax Planning | Already available | Tax and retirement funds |
| Healthcare Planning | Already available | Health Services Benefits |
| Legislation | Already available | FICA: Annual update |
| Short-Term Insurance | Already available | Short-term Insurance |
| Investment Planning | Already available | Investment Planning Products |
| | Already available | Investment Planning for Financial Planners |
| Practice Standards | Already available | Practice Management Considerations |
| Interpersonal Skills | Already available | Social Media Use |

**Note:**

All courses are open for registration however the course will be accessible after specific dates