

## Application for approval of Continuous Professional Development (CPD) points/hours for individual activity/publications

### The FPI is a SAQA Recognised Professional Body

**2021 Fee structure:**

- R 700.00 (incl. VAT) per individual activity
- R 400.00 (incl. VAT) per individual newsletter
- R 700.00 (incl. VAT) per individual publication
- R 5425.00 (incl. VAT) CPD Newsletter (Bulk) Newsletter
- R 5425.00 (incl. VAT) CPD Book

**NB** Please note in order to have **any** of the above approved, one must be a Recognised CPD Provider of the FPI.

Kindly ensure that you take note of the terms and conditions below before completing and submitting this application to [certification@fpi.co.za](mailto:certification@fpi.co.za)

### Section A - provider details

1	Applicant name		
2	FPI Approved CPD Provider number		
3	Contact details of applicant	Telephone number	
		Email address	
4	Order number: <i>(for invoicing purposes)</i>		
5	Company name		
6	Billing address <i>(for invoicing purposes)</i>		
7	Company VAT number <i>(for invoicing purposes)</i>		

### Section B - Event details

8	Event name		
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9	<p>What is the format of the event</p> <p>(Face-to-face events, live webinar, online activity, etc.)</p>	
10	Date/s of event	
11	Venue details (not applicable for webinars/online activities)	
12	Who is it aimed at? (E.g. financial planners/financial advisors/para-planners Business owners/consumers, other)	
13	What level is it? (Entry level/ intermediate/ Advanced).	
14	<p>What are the learning outcomes of the activity?</p> <p><b>COMPULSORY FIELD.</b> Failure to complete this field will lead to no approval of the CPD activity</p>	
15	Verifiable CPD activity or non-verifiable CPD activity?	Yes No
16	<p><b>If Verifiable CPD:</b> How will the identification of attendees of this CPD activity be objectively verified?</p>	
17	<p><b>If Verifiable CPD:</b> What measures are in place to ensure that attendees complete this CPD activity?</p>	
18	Is this a renewal application for an existing approved activity	Yes No
19	<p>Had there been changes to the activity since last approval If so please provide us with the updated learning material</p>	Yes No

## Section C - Event specific details

20	Please list all the learning materials for the activity <i>and provide copies to the FPI</i>	I confirm that I have attached the learning materials to this application
21	Please tell us about the speakers/trainers for this event:	I confirm that I have attached biographies for each of the trainers/speakers to this application (regardless of how well known a speaker may or may not be)
22	How will attendees register for the activity? (Include any contact name, telephone of email address or company/ event URL link)	I confirm that it is my organisations responsibility to advise delegates if an activity is cancelled or changed



## Terms and Conditions relating to activity approval

1. A fully completed application form must be send to FPI for evaluation purposes.
2. Submission of applications must be accompanied by proof of payment. The application cost for approval of CPD activity will be determined by FPI from time to time.
3. Topics offered in the activity should reflect the knowledge, skills and/or abilities required from a financial planner as stated in the [FPI Competency Profile](#) and/or the abilities skills and knowledge required from a Financial Advisor as stated in the [FPI Financial Advisor Competency Profile and Curriculum](#). Topics offered could also cover the [FPI Code of Ethics and Practice Standards](#)
4. CPD activity application **must** be accompanied by relevant supportive documentation such as; presentations, learning material, agenda etc. to evaluate the suitability of the activity content. *No activity will be approved without supporting evidence.*
5. All providers must be able to record the identity of all attendees and provide verifiable evidence that the attendee attended the event and completed the activity.
6. No refunds will be made if the FPI declines to approve a CPD activity due to any valid reason.
7. Product Specific Training cannot be approved for CPD purposes. Should such a request be received - the approval fee is not refundable or transferrable.
8. Attendance registers containing name, contact details and ID/passport number of all attendees must be sent to the FPI within five (5) working days after the event.
9. it remains the financial services providers (FSP)'s accountability to show compliance to the regulator / commissioner that CPD requirements were met in terms of fit and proper requirements.
10. FPI does not endorse any CPD event but evaluates and approves the CPD programmes/ activities in terms of the documents mentioned in 3 above and allocates **CPD points** accordingly. One CPD point is equal to one CPD hour.
11. Should a CPD Provider request a review to be done after the approval is issued then an application fee will be charged again to cover the outsourcing costs.

### I ACCEPT THE TERMS AND CONDITIONS

Full name	
Date	
Signature	