

Recognised CPD Provider Application form

Approval fee: R 4370.00 for 2021



Financial Planning
Institute of Southern Africa

THE PROFESSIONAL STANDARD

Company Name		
Contact person name		
CO Reg number (CIPRO doc to be attached)		
Contact details of applicant	Telephone number	
	Email address	
Billing address (for invoicing purposes)		
Postal address		
Company VAT number (for invoicing purposes) TCC Certificate to be attached		
Company URL		
Industry		
FSP Number/SETA and or QCTO approval number:		
Describe how FPI members will benefit from the courses that you plan to offer.		
Indicate in which areas you plan to offer training:		
Financial Management	Asset Management	Retirement Planning
Tax Planning	Risk Management	Estate Planning
Ethics & Practice Standards	Professional Skills & abilities	
Step 1. Process description		
Processes Description for quality assurance		

Step 1. People

List the individuals involved in your CPD process from start to end

Step 1. Systems Description

List the software systems that you have in place and make use of for roll out of your CPD activities

Step 2. Programme Developers

Please list all your SME's and provide a short concise detailed bio for each SME whom develops and decides on the content to be rolled out for each CPD activity

Step 3. Management of records (Manage of attendee records details)

Please describe your process for face to face and online training registrations and management of attendance records for face to face and online CPD activities including period how long records are kept and in what format records will be kept.

Please note:

- The FPI CPD policy and Competency Profile that supports the FPI CPD offerings are available on www.fpi.co.za.
- As part of the recognition, as an FPI Recognised CPD Provider, the FPI reserves the right to send a senior representative to an event free of charge.
- The recognised provider will furnish FPI with any and all marketing material relevant to the event to determine accurate display of FPI collateral.
- FPI will list all recognised CPD providers on the FPI website.
- The recognition of a provider will only remain valid for a period of 12 months. A CPD Provider will be notified prior to expiration date to renew CPD Provider status and a CPD Provider fee will be payable before assessment of renewal application.
- CPD programme applications must still be submitted, with detailed agendas for each event, in good time, for prior approval. Irrelevant sections of an event will be excluded from the overall allocation of CPD hours including product related content. Only aspects relevant to the FPI curriculum and competency guidelines will be recognised.
- FPI has the final authority to award or decline the allocation of CPD hours.
- Your company will be required to submit a register of attendees of any event within five working days after such event. Such a register should clearly indicate FPI member details. Should a FPI member be audited and have attended one of these events, FPI would confirm the member's attendance with your records.
- In line with future CPD provisions, the provider will be required to provide FPI for each programme approval with suitable assessments for members to complete.
- Please email completed application form to certification@fpi.co.za for evaluation and processing.
- A fee of **R 4370.00** is payable upon application. An invoice will be submitted upon receipt of the completed application form. Please note that the CPD Provider application fee is non-refundable should a firm be declined.

I hereby confirm that I have read and understood the above information and that I have full authority to act on behalf of my employer.

Name (block letters):

Signature:

Date:

Please note that fees for Recognised CPD Providers are R R 4370.00 INCL VAT.

Please complete the form and email it back to certification@fpi.co.za.