

FPI Diversity and Inclusion Award

2022 Guideline and Application Form

Overview

Our primary aim, as the Financial Planning Institute (FPI), is to be a community that fosters the value of financial planning and advances the financial planning profession. The Institute's strategy, to accomplish our objectives, involves welcoming all those who advance the financial planning process.

In this spirit, we have established the FPI Diversity and Inclusion Award to assist with our mission to develop strategies to raise awareness and promote inclusiveness of diverse communities including but not limited to; race, ethnicity and gender in the financial planning profession. In so doing, we strive to increase professional opportunities for the widest spectrum of people so that all may join and thrive in the financial planning profession.

The Institute has developed the following guidelines, in establishing this merit-based programme, to sponsor Diversity and Inclusion Award recipients to attend the FPI Annual Professionals Convention 2022 and promote inclusivity and creativity within the financial planning profession.

I. Description of award

This award recognises individuals whose commitment to diversity and inclusive excellence has made an impact on various ethnic groups, races and diverse cultures in a positive way.

II. Number of awards

In this category, we offer one award annually which can be presented to a maximum of 5 individuals.

III. Eligibility

Recipients of this award are not eligible to receive the same award again for a five-year period. Nominees who are not recipients of this award may be nominated for it in consecutive years.

IV. Who is eligible to apply for the conference attendance grant?

Any person willing to demonstrate and act upon an intense desire to affect the diversity of the financial planning profession, including but not limited to:

1. raising awareness of the profession in diverse communities;
2. serving diverse communities with financial planning; and/or

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3. increasing professional opportunities for diverse communities within the financial planning profession.

What does the Diversity and Inclusion Award include?

- Attendance to the 2023 FPI Professionals Convention (up to R6,000).
- VIP attendance and mention at 2023 FPI Annual Awards Ceremony Gala Dinner.
- Hotel accommodation for the 2023 convention (up to two 2 days capped at R3,000).
- Travel to and from the convention city (where it is held for that respective year) (capped at R4,000).
- One-year paid individual membership for the Financial Planning Institute (if applicable).
- One video profile to be published on all FPI online platforms (social media and FPI website and FPI Online Community).

Award decision

The decisions to grant this award will be made at the full discretion of the FPI Transformation Committee or other body duly appointed by the FPI chief executive officer.

All applicants are responsible for reading, understanding and abiding by all of the guidelines.

No portion of the prize is transferable to another person and cannot be converted to cash.

Award winner responsibilities

- Award winners will attend the convention and gala dinner in the same year of being awarded;
- Award winners will make themselves available for interviews related to the award; and
- Public relations activities (media interviews, article requests and profile opportunities).

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Application criteria

Complete application packages must include the following items:

- Diversity and Inclusion application
- CV of applicant
- One reference letter solicited by the applicant from either lecturers or financial services professionals on original letterhead or email format clearly listing
 - Name of nominee
 - Email address of nominee
 - Brief statement describing merits of the nominee
 - Name of nominator
 - Email address of nominator

Letter to also provide evidence that the nominee’s commitment to diversity has had a significant impact on individuals/communities/organisations. Contact information for references should be included.

Selection criteria

The committee will be evaluating the nominee’s sustained service. The primary consideration for the committee will be the impact and quality of improved conditions within the community that have enhanced society.

Relevant deadlines

Submissions must be complete (including both letters of recommendation and application) and submitted to at FPI by the submission deadline. Submissions received after the deadline, or still incomplete will be discarded. Items postmarked on the submission deadline and not received on time will not be considered.

Event	Date	Location	Submission Deadline	Notification Deadline
FPI Awards Ceremony Gala Dinner	19 th October 2022	Johannesburg	02 nd August 2022	07 th October 2022

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Send nomination packets to:

FPI Diversity and Inclusion Award

Financial Planning Institute,

84 Sophia Street, Fairlands, Johannesburg, 2170

Email: awards@fpi.co.za

Application Form

Please answer all questions in this application, including listing “not applicable” where appropriate”

First name:	
Last name:	
Telephone (W):	
Mobile:	
Email address:	
Physical address:	

Are you a current FPI member? _____yes _____no

How did you learn about this award? _____

Education (fill in all that apply):

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Professional achievement/s: Please list any professional achievements for the past 10 years, starting with the most recent.		
Type of achievement	Year	Name of organisation

Community service: Please list any community service activities for the past three years, describing the nature of your involvement.		
Type of community service	Year	Nature of involvement

Short essay section: Please answer the following questions in your own words.

- List of diversity activities

1	
2	
3	
4	

- Statement summarising philosophy and commitment to diversity activities. This statement should discuss the nominee’s commitment to the significance of diversity and inclusive excellence. Statement is limited to 1,000 words.

What does diversity mean to you and how does your personal view of diversity relate to the financial planning profession?

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3. In your opinion, what role can FPI play in fostering a culture of diversity and inclusion in the financial planning profession?

4. Do you have any additional comments we should consider with your application?

By my signature below, I agree that the information submitted herein is complete, truthful and accurate, to the best of my knowledge. I have read, understand and will comply with all guidelines of this scholarship programme. I further understand that FPI will not be liable for payments, in whole or in part, if I fail to fulfil my responsibilities for the programme within the prescribed timeframe.

The decision to provide this award will be made in the full discretion of the FPI or other body duly appointed by the FPI CEO. Incomplete or late applications will not be considered.

Additionally, I do intend to become an involved member of FPI as I recognise the importance and value of actively contributing to the advancement of the profession. By

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applying for this award, I understand that if I am selected that I will be asked to discuss my experience by providing a testimonial and feedback to the committee.

Signature of applicant:	Date:
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***Be sure to attach to this form your CV as well as at least one letter of recommendation from lecturers and/or financial services professionals with the completed application.**

Send nomination packets to:
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Financial Planning Institute
Email: awards@fpi.co.za