



PROFESSIONALS

CONVENTION

Century City Conference Centre

19-20 OCTOBER

2017

LEAD | INSPIRE | BUILD TRUST

PROGRAMME



Convention Day 1: Thursday, 19 October

TIME	TOPIC/ SPEAKER
07h00	Registration opens
08h30 – 08h45	FPI Chairperson sets the scene Speaker: Ntai Phoofolo, CFP®
08h45 – 09h45	Topic: The state of the South African economy Speaker: Jeremy Gardiner (Investec)
09h45 – 10h30	Topic: The effects of political uncertainty on our economy Speaker: Justice Malala (The Justice Factor)
10h30 – 11h00	TEA BREAK
11h00 – 11h30	Topic: Financial Coaching 101 - making the client connection Speaker: Nigel Willmott, CFP® (Momentum Consult) Gina Görgens (Stellenbosch University)
11h30 – 12h45	Topic: Regulatory change is upon us – What now? (Panel discussion) Facilitator: Ian Middleton, CFP® (Masthead) Panel members: David Kop, CFP® (Financial Planning Institute) National Treasury Representative Caroline Da Silva (Financial Services Board) Gerhardt Meyer, CFP® (Board Member of Financial Planning Standards Board)
12h45 – 13h45	LUNCH
13h45 – 15h00	Topic: A global perspective on the financial planning profession Facilitator: Kate Holmes (FPSB) Overview: Pamela Packard, CPA (Chairperson of Financial Planning Standards Board) Panel members: Barry Horner (UK FPSB) Marc van Poeteren (Netherlands FPSB) Dan Busi (Financial Planning Standards Council) from Canada Kimmis Pun (FPSB)
15h00 – 15h45	Topic: How to succeed at Transformation, Diversity and Inclusion Facilitator: Godfrey Nti (Financial Planning Institute) Panel members: Caroline Da Silva (FSB) Prem Govender, CFP® (former FPI Board Chairperson) Navin Ramparsad, CFP® (FPI Chairperson-Elect)
15h45 – 16h15	Topic: If I could turn back time - A client's perspective on planning Speaker: Andrew Merryweather (Autus Fund Managers)
16h15 – 17h15	Topic: The Champion's Code Keynote Speaker: Ross Bernstein (International Inspirational Business Speaker)
17h15	End of day 1
18h30	FPI Awards Ceremony Gala Dinner (booking required)

Convention Day 2: Friday, 20 October

TIME	TOPIC/ SPEAKER
07h00	Registration opens
08h00 – 08h30	Topic: What this journey means to me and our financial planning profession Speaker: 2017/2018 FPI Financial Planner of the Year
08h30 – 09h00	Topic: SAQA/FPI Research - Policy implications that financial advisors must be aware of (Panel discussion) Facilitator: Gugulethu Cele Panel members: Joe Samuels (CEO of South Africa Qualification Authority [SAQA]) Godfrey Nti (FPI CEO)
09h00 – 10h00	Topic: Growing your practice through retention Speaker: Prof Deena Katz, CFP® (Texas Tech University, Personal Financial Planning)
10h00 – 10h30	TEA BREAK
10h30 – 11h15	Topic: Online communication - The secret disruptor for financial planners Ted talks: Tim Slatter - Your online communication needs to disrupt, not interrupt Dr Nik Eberl - How financial advisors can leverage disruptive innovation to grow their business Kobus Kelyn, CFP® - Position your personal brand to disrupt through the power of social media Tsholofelo Dihutso, CPRP - #Friend or #Foe
11h15 – 12h00	Topic: FinTech: Threat or Opportunity? Ted talks: Ronald King, CFP® (PSG) Jacques Rossouw (Astute) Maarten Boddeus (Object Way)
12h00 – 13h00	LUNCH
13h00 – 13h30	Topic: Pro Bono and Volunteerism: Don't dribble your money away Facilitator: Nigel Willmott, CFP® (Momentum Consult) Panel members: Janet Hugo, CFP® (Sterling Private Client) Phil Masinga (Bafana Bafana and Leeds football legend) Eugene Zwane (Orlando Pirates legend)
13h30 – 14h30	Topic: Investments in South Africa: A look ahead Facilitator: Anton Swanepoel, CFP® (Amity Wealth) Overview: Pieter Koekemoer, CFP® (Coronation) Panel members: Andrew Salmon (Old Mutual) Sumesh Chetty (Investec Asset Management) Craig Gradidge, CFP® (Gradidge-Mahura Investments) Kyle Hewett (Argon Asset Management)
14h30 – 15h30	Topic: Develop a power mindset Keynote Speaker: Ryan Stramrood (Stramrood Connect)
15h30 – 15h45	Closing Remarks / Rappateur Speaker: Chairperson-Elect (Financial Planning Institute)
15h45	Close