



FINANCIAL PLANNING WEEK

An FPI and Financial Services Industry Initiative



PROMOTED BY IOSCO
WORLD INVESTOR WEEK 2017



WORLD FINANCIAL PLANNING DAY
PROMOTED BY FPSB

Life is better with a **CERTIFIED FINANCIAL PLANNER®** professional

Financial planning involves setting clear financial goals for a balanced financial future. 2 - 8 October 2017 also known as Financial Planning Week, South Africa focuses on the importance of planning your finances and dealing with a CERTIFIED FINANCIAL PLANNER®/CFP® professional to meet your financial goals.

According to the Financial Planning Institute of Southern Africa's (FPI) 2016 Global Consumer Survey:

38%

of South African consumers are confident that they will achieve their financial goals

27%

of South African consumers are successful in sticking to their financial strategies

WHAT ARE CONSUMER'S MAIN FINANCIAL CONCERNS?



Owning their own homes



Being free of major financial debt



Being able to financially support their loves ones



Retiring into a comfortable lifestyle



Managing finances to achieving life goals

BARRIERS PREVENTING CONSUMERS FROM WORKING WITH FINANCIAL PLANNING PROFESSIONALS

70%

don't know who to trust

62%

can't afford it

55%

don't know where to start

WHAT A CFP® PROFESSIONAL CAN DO FOR YOU:

- ✓ Help you save money
- ✓ Create a comprehensive financial plan tailored to your needs
- ✓ Help explain and simplify financial matters
- ✓ Help establish financial goals and put in place plans to achieve them

HOW CAN FINANCIAL PLANNING WEEK HELP?

- ✓ Raises awareness around the importance of financial planning
- ✓ Encourages consumers to take positive planning action

WHY CFP® PROFESSIONALS ARE VALUED?



HAVING A COMPREHENSIVE FINANCIAL PLAN AND A CFP® PROFESSIONAL PUTS CONSUMERS IN CONTROL

Book for a free, no strings attached, financial planning consultation or workshop in your area.

www.financialplanningweek.co.za

Where can you find a  professional?

086 1000 FPI (374) or www.letsplan.co.za