

## RE M I N D E R !!

The Financial Planning Institute of Southern Africa cordially invites you to attend the **EMPANGENI CPD SESSION**

**Venue:** Empangeni Country Club, 46 Pearce Crescent, Kwa-Zulu Natal

**Date:** **9th September 2010, Thursday**

**Bookings close:** 6th September 2010, Monday

**Link:** [Register online](#)  
*(Seating is limited so please book early)*

**Cost:** Members: R135.00

Non-Members: R175.00

**Please note that payment is required *BEFORE* the event.**

**No cash payments will be accepted on the day**

**CPD points:** 2 CPD Points for members

**Banking Details:** Beneficiary: Financial Planning Institute

Branch: Standard Bank Clearwater Mall

Account No: 021183732

Branch Code: 001206

*Reference to be used: Your invoice number*

### Programme:

07h30 - 08h00 Registration & Light Breakfast

08h15 - 09h15 **Topic: ESTATE DUTY AND LEGAL UPDATE**  
**Speaker : David Thomson CFP®**

David Thomson is an attorney, having obtained the BA and LLB degrees from the University of Kwa-Zulu Natal. He is currently employed by Sanlam Life (Broker Services) as a Legal Adviser serving independent and selected bank brokers. He has been with Sanlam for 13 years and specialises in estate and retirement planning; trusts and business assurance.

In 2008 he graduated with an Advanced Higher Diploma in Financial Planning conferred by the University of Free State, in Estate Planning & Advanced Investments. David currently serves on the FPI's Kwa-Zulu Natal Regional Committee and chairs the Estate and Trusts Planning ISG Committee.

09h30**Topic : EMPLOYEE BENEFITS UPDATE**

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10h30

**Speaker : Barry Hugo CFP®**

Barry is a Chartered Accountant and CFP® professional. He has been involved in the financial planning industry for the last 16 years and has run an independent Employee benefits book for the last 14 years.

### TERMS & CONDITIONS

- **Cancellations and non-attendance:** Written or telephonic cancellations may be made up to 24 hours after the closing date for bookings. The full event fee will then be refunded. No refunds will be made thereafter for cancellations received, or for non-attendance.
- **Non payment:** Should no payment be received for registered delegates, within 24 hours after the closing date for bookings, attendance will be cancelled and a sms notification sent.
- **Substitutions:** Registered delegates may be substituted at any time before the event date. Please notify us telephonically or in writing of the change. Members may not be substituted by non members due to the discounted attendance fee for members.
- **Payment:** legible proof of payment to be faxed to Accounts on 086 632 8158 reflecting the name of the delegate, reference number and event being paid for. Please note that even if payment has been made into our bank account, your account will not reflect as being paid unless a copy of the correctly referenced deposit slip is received by our office.

**Invoices and confirmations:** are issued online. After going through the registration process, the system will automatically give you the option of an invoice, and once payment has been received by our office, you will be able to print a confirmation from the website. Should you require any assistance with the online registration form, please contact our Frontline Services Team on (010) 210-5733/4/5/6. Everything in this email and any attachments relating to the business of the Financial Planning Institute of Southern Africa (FPI) is the property of the company. It is confidential, legally privileged and protected by law. The FPI does not own or endorse any other content. Views and opinions are those of the sender unless clearly stated as being the official FPI business view.

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