

Financial Planning Week Toolkit



Let's join forces and promote Financial Planning Week

Financial Planning Week is one of the most exciting annual consumer initiatives, aimed at making a real difference in the lives of normal South Africans. The initiative is also an ideal way to raise awareness about CFP professionals and professional financial planning.

Research shows that pro bono activities have clear benefits to the practitioners themselves as well as their employers, over and above the "feel good factor" that comes from serving the community.

The success of financial education outreach programmes will always be dependent on the time and support that the financial services industry is willing to donate. If most of us get involved in one of these opportunities, consumers in this country will experience the benefits of financial planning and will insist in dealing with a professional financial planner/advisor.

HOW CAN YOU GET INVOLVED?

Simply by using some- or all- of the resources in this toolkit. Some of these tools can be tailored to your organisational needs and will send out a positive message to the public and the clients you serve.





Suggested Activities

WAYS YOU CAN GET *INVOLVED* TO HELP PROMOTE

FINANCIAL PLANNING WEEK

1. REACH OUT to your friends, family, clients and colleagues about the importance of Financial Planning Week and why they should spread the word about the importance of professional financial planning advice.

2. INFORMATION SESSIONS. Host information sessions on subjects related to financial planning e.g.:

- Family Financial Wellness
- The Retirement Rules Have Changed, What Now?
- Financial Planning for Young Families
- Understanding Money Matters and Having Fun With It and Business Succession Planning
- Planning Your Financial Future
- Students: Plan For Your Success
- Parents Helping Kids Help Themselves
- Financial Planning for All Abilities

Or align your own financial planning clinics and host these during Financial Planning Week. Remember to send details of your information session, such as venue, dates and contact details to volunteers@fpi.co.za. The information will be uploaded on the Financial Planning Week website.

3. MYMONEY™123 SESSIONS If you have identified a particular group, church, community, employer etc., you can volunteer to host a MYMONEY123™ session. The aim of the programme is to actively engage all South Africans to consider and ponder their personal financial planning responsibilities and goals. You can contact FPI with details and the office will assist you in putting the session together.

4. FREE CONSULTATIONS. You can volunteer to participate in Financial Planning Week by providing “free financial planning consultation” during that week. Your details will be listed on the Financial Planning Week website. Consumers can contact you to make an appointment for a free consultation.

5. FREE WILLS. Encourage your fellow CFP® professionals or staff members to draft a free Will or to update a Will during Financial Planning Week



Resources and Templates

MEDIA PRESS RELEASE

Please modify where appropriate and don't forget to add a supporting quote from your company's spokesperson.

[Insert name of Organisation] joins the Financial Services Industry in celebrating the Financial Planning Week 2018

[Insert name of Organisation] is proud to announce its support for the national Financial Planning Week, joining over 1000 other industry CERTIFIED FINANCIAL PLANNER® professionals in offering FREE financial planning consultation to consumers for the week.

The nationwide joint industry initiative is scheduled to run from 8-12 October 2018 (*in support of Money Smart Week, World Financial Planning Day to be held on 3 October and World Investor Week to be held from 1-7 October*) and encompasses of a variety of sub campaigns that are aimed at conscientising South Africans about the importance of financial planning.

During the course of the week, *[Insert name of Organisation]* will provide free access to its CERTIFIED FINANCIAL PLANNER® professionals who will conduct an analysis of the general consumers' financial situations and run financial literacy clinics at selected regional retirement villages backed by the FPI.

[Insert name of Organisation Spokesperson] said: *[Insert quotation here]* and will be hosting a financial literacy clinic at [Details of the event] to celebrate the Financial Planning Week.

[Insert name of Organisation] encourages all residents of [Name of regional area] to take action and invest in their future.

Contact us on *[Insert contact details]* to make a booking for a free consultation session with a CERTIFIED FINANCIAL PLANNER® professional.

IDENTIFICATION ELEMENTS - THE LOGO

The following logos can be used on all materials or communication platforms e.g place the "I support Financial Planning Week" on your website and email signature.

The mandatory clear space around the logo is equal to the measure "Y".



IDENTIFICATION ELEMENTS - LOGO APPLICATION



The logo should not be overlapped by or blended with other visual objects or text.



The logo should be displayed as a whole; not partially, as a section or detail thereof.



The compositional area of the logo may not be interfered with, defaced or creatively adapted in any form.



No rotation or skewing may be made to the logo.



The unique font type may not be changed.



The logo may not be applied on a photographic image background



The logo may not be applied on a coloured background



The logo may not be outlined

IDENTIFICATION ELEMENTS - COLOURS



0c / 100m / 100y / 0k
Pantone 485 C
R237 / G28 / B36
#ed1d24

75c / 5m / 100y / 0k
Pantone 363 C
R64 / G242 / B0
#40F200



100c / 33m / 22y / 0k
Pantone 3015 C
R0 / G171 / B199
#00ABC7



51c / 57m / 7y / 15k
Pantone 265 C
R106 / G93 / B202
#6A5DCA



0c / 50m / 100y / 0k
Pantone 717 C
R255 / G128 / B0
#FF8000

Posters can be used to create more awareness around the Financial Planning Week initiative. These could be posted at your nearest community hall, church, grocery stores' notice board etc.

INVEST IN YOUR FUTURE
FINANCIAL PLANNING WEEK
08 - 12 OCTOBER 2018
An FPI and Financial Services Industry Initiative

3 OCT 2018
WORLD FINANCIAL PLANNING DAY
HOSTED BY IFA

WORLD INVESTOR WEEK 2018

In support of
MONEY SMART WEEK
SOUTH AFRICA 2018
Imali yami intuthuko yami

Invest in your future.

What is the one thing that stays the same in your life?

Change life happens, but doesn't always go according to plan, but even if it does, you still need a *financial plan* to achieve your life goals.

www.letsplan.co.za

CONSUMER COMMUNICATION - ONLINE/SOCIAL MEDIA MESSAGING

Please use the examples in the “how to get involved document”. **EMAIL** your clients a link to the Financial Planning Week website or add the link or even insert the Financial Planning Week logo in your email signature.

GET SOCIAL ON TWITTER (#FPW2018), (#askaCFP), FACEBOOK AND LINKEDIN

Share our posts and retweet our messages with your followers and join the discussion today! We'll be sharing news and tips every day of the week, so come back often. To get you started, here are a few messages you can share about Financial Planning Week with your followers:

- Date and website for more information! **www.financialplanningweek.co.za**
- Need help with your finances? Seek advice from a **CERTIFIED FINANCIAL PLANNER®** professional today! **www.financialplanningweek.co.za**
- Finding the right financial planner is important; download **10 questions** from: **www.financialplanningweek.co.za** to find your prospective financial planner.
- Why seek advice from a **CFP®** professional? Watch the video here **http://www.youtube.com/watch?feature=player_embedded&v=qZbexBseYPA**
- South Africans who engage in comprehensive financial planning feel confident in their plans to retire vs. those who don't plan.
- Those who work with **CFP®** professionals are more likely to report their financial affairs are “on track”

COMMENT ONLINE on financial planning blogs and online articles and tell people about why you think financial planning can benefit South Africans.

CONSUMER COMMUNICATION - WEB BANNERS

Show your support and upload Financial Planning Week banner adverts on your website with a link to www.financialplanningweek.co.za



Handout copies of the Financial Planning Week brochures to your clients, consumers attending your planned Financial Planning Week events and colleagues. The following brochures highlight the importance of financial planning.

**Get more
out of life with
*a financial plan***

There are more benefits to having a financial plan than you may realise. A comprehensive financial plan can help you:

- Balance today's needs with your goals for the future;
- Adapt to changes in your circumstances and needs;
- Prepare for unexpected emergencies;
- Achieve your life goals; and
- Experience peace of mind.

People who engage in comprehensive financial planning feel closer to achieving their life goals.

INVEST IN YOUR FUTURE
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CFP[®]

Ways to Invest *in your future*

- Draw up a spending plan (budget) with financial goals.
- Start a savings account for a child, holiday or a gift for yourself.
- Include your children in the running of the household budget for a month.
- Check how much you're spending on bank charges – are you on the right plan?
- Get your estate in order: Create or revise your will.
- Pay money into your credit card.
- Establish an emergency fund.
- Put together a "Financial File" where all your important documents are kept.
- Evaluate your company pension benefits.
- Develop your holiday spending budget.
- Subscribe to a personal finance magazine or online site or visit www.fpi.co.za.
- Invite a professional financial planner to speak at your workplace.
- Review your life, disability, critical illness insurance coverage and investments.
- Investigate the funds your investments are invested in and read up on them.
- Look up three financial terms that have baffled you and resolve to understand them.
- Book an appointment with a CFP® professional in your area, Find a financial planner on www.fpi.co.za.
- Contact FPI for a free FPI MYMONEY123™ financial education programme which focuses on the basics of personal financial wellness. Schools, companies, church groups, societies or any other groups are welcome.





FINANCIAL PLANNING WEEK

An FPI and Financial Services Industry Initiative



Mistakes and Misconceptions

You are the focus of the financial planning process. The results you get from working with a financial planner are as much your responsibility as the planner's. To achieve the best results, you will need to be informed about what you can realistically expect from the financial planning process. Many people don't really understand the value of financial planning. As a result, many people:

- Think financial planning is the same as investing and retirement planning.
- Neglect to set measurable financial goals.
- Neglect to evaluate their financial plan periodically.
- Expect unrealistic returns on investments.
- Are looking for a quick financial fix instead of a long term strategy.
- Don't understand that good professional financial planning advice is largely dependent on good information from clients.
- Believe financial planning is primarily tax planning.
- Think they'll lose control over their decisions if they use a financial planner.

Avoid giving in to the fantasies.

Consider the following facts:

Financial planning uses a big-picture approach

Each financial decision you make may affect several other areas of your life. For example, an investment decision can have tax consequences harmful to estate plans; a decision about a child's education may affect when and how you meet your retirement goals. A professional can help guide you on these decisions.

re-evaluate your Financial situation periodically

Financial planning is a dynamic process. Your aims may change over the years due to changes in your lifestyle or circumstances, such as a birth, an inheritance, marriage, house purchase or change of job status. Revisit and revise your financial plan to reflect these changes so that you stay on track.

Measurable Financial goals Must be set

Set specific targets that will help you achieve what you want when you want it. For example, you need to quantify terms such as "comfortable retirement" or "good education for your children" so that you'll know their real implications.

start by asking the right questions

When working with a financial planner, be sure you understand the process and what the financial planner should be doing. Ask how the

financial planner is being compensated. Provide the financial planner with all of the relevant information on your financial situation. Ask about the recommendations offered to you and play an active role in the decision-making.

reMeMber, you are in charge

It's also important that you set realistic expectations. Financial planning is a common sense approach to managing your finances to reach your long-term goals. It can't change your situation overnight. It is a lifelong process. Remember that factors beyond your control, such as the stock market, inflation or interest rates, will affect your planning results.

achieving your goals is the bottom line

Life is hectic, and all too often we get sidetracked from reaching our life goals. But proper planning that includes a relationship with a financial planner who helps you articulate your goals and then prepares a plan that will help you meet them will greatly increase your chances of being financially prepared to handle both the expected and unexpected.

Investing in a financial plan is investing in your future. And a professional financial planner can help you increase your chances of making that plan a reality.

Visit www.financialplanningweek.co.za, take action and invest in your future.  FPI_SANews #FPW2018



Contact Us

Visit www.financialplanningweek.co.za to download all the templates.
For further information please contact volunteer@fpi.co.za or (011) 470-6000