



I am a CERTIFIED FINANCIAL PLANNER® professional and a member of the Financial Planning Institute of Southern Africa (FPI).

Code of Ethics and Professional Responsibility:

In all my professional engagements I will observe and abide by the principles of the FPI Code of Ethics and Professional Responsibility. I have and I will:

- Continue to place my client's interests first.
- Provide professional services with integrity.
- Provide professional services objectively.
- Be fair and reasonable in all professional relationships and disclose and manage conflicts of interest.
- Act in a manner that demonstrates exemplary professional conduct.
- Maintain the abilities, skills and knowledge necessary to provide professional services competently.
- Protect the confidentiality of all client information.
- Provide professional services diligently.

Complaints:

FPI takes great pride in the standards of professionalism of its professional members and therefore hold the professional conduct and integrity of its professional members as a primary concern. Should you feel that I have not complied with the principles of the FPI Code of Ethics and Professional Responsibility, you may lodge a complaint with FPI at complaints@fpi.co.za.

A copy of the complete Code of Ethics and Professional Responsibility is available on the FPI website at www.fpi.co.za.