



GUIDELINES FOR THE USE OF THE FPSA[®] DESIGNATION AND MARK

1. Summary

- 1.1. FISA[®] has registered the FPSA[®] mark and designation and the words Fiduciary Practitioner of South Africa[®] as exclusively proprietary to FISA[®]. Nobody other than a person to whom the right to use it has been conferred by FISA[®], is entitled to use either form of the designation.
- 1.2. FPSA[®] is not, and does not purport to be, an academic qualification, but is the certificated gateway to entrance into the profession of fiduciary practitioner in South Africa, as represented by FISA[®].
- 1.3. The designation/mark may be used as indicated below:

Koos van der Merwe, FPSA[®] ✓
B Com, LL B, H Dip Tax

or

Thandi Mkwazi ✓
Fiduciary Practitioner of South Africa[®]
BA, LL M

or

Ravendri Pillay ✓
FPSA[®], TEP

but not

John Smith ✗
FPSA[®], B Com (Hons.)

- 1.4. The letters F,P,S and A must always all be in capital letters, no full stops should ever be inserted between the letters, the registration mark must always be present in superscript, and the member must follow the guidelines in 4.6 below when introducing him-/herself to anybody as holding the designation.
- 1.5. Members should contact the FISA[®] secretariat when in doubt about anything contained in this document.

2. Rights to the mark

FISA® has registered the FPSA® mark and designation and the words Fiduciary Practitioner of South Africa® as exclusively proprietary to FISA®.

Only FISA®, through its elected council and/or other structures as may exist from time to time, has the right to grant the right to use the mark to individuals who have satisfied all the requirements set by the FISA® council and/or other structures to whom such duties may have been delegated.

As such, FISA® reserves the right to determine these requirements from time to time through any of its elected or appointed structures, by direction of the FISA® council or its successors in title.

3. FPSA® not a qualification

FPSA® is not, and does not purport to be, an academic qualification.

FISA® has not applied for the designation or mark to be recognised as an academic qualification with the South African Qualifications Authority (SAQA) and does not intend to do so.

The designation is the certificated gateway to entrance into the profession of fiduciary practitioner in South Africa, as represented by FISA®.

As a voluntary association, FISA® strives to:

- *Promote the fiduciary profession;*
- *Promote the interests of clients of fiduciary professionals through the setting and enforcement of professional standards of conduct for fiduciary professionals;*
- *Provide a framework within which members can achieve the qualifications and competence to practise as fiduciary professionals;*
- *Ensure that members maintain the highest professional and ethical standards in the pursuance of their profession;*
- *Promote the interests of members in fulfilling their professional aspirations.¹*

In this quest, FISA® sees FPSA® as an essential differentiator and mark of quality and peace of mind for consumers of fiduciary services in Southern Africa.

4. Correct use of the designation/mark

4.1. The designation/mark may only be used as follows:

FPSA®

or

Fiduciary Practitioner of South Africa®

¹ See clause 7 of the FISA Constitution

FP^{SA}®

or

Fiduciary Practitioner of South Africa®

in any dark coloured font or in white on a dark background, in any font size that corresponds with that used in the surrounding text, and in bold or normal font.

- 4.2. As it is not a qualification, it must not be put in the same line as the person's academic qualifications, e.g.

Koos van der Merwe, FP^{SA}® ✓
B Com, LL B, H Dip Tax

or

Thandi Mkwanazi ✓
Fiduciary Practitioner of South Africa®
BA, LL M

or

Ravendri Pillay ✓
FP^{SA}®, TEP

but not

John Smith ✗
FP^{SA}®, B Com (Hons.)

- 4.3. The letters F,P,S and A must always all be in capital letters.
- 4.4. No full stops must ever be inserted between the letters.
- 4.5. The indication of registration of the mark (®) must always be present in superscript. In MS Word the option to insert this symbol is available under the "Insert" tab at the top of the tool bars, and the option to put it in superscript is available on right click under "Font" or under the "Home" tab under the "Font" cluster, where it can also be activated by clicking the x² icon with the mark highlighted. An alternative is to hold down the "Alt" key and type in 0174.
- 4.6. When a member introduces him-/herself to anybody else and elects to draw attention to the designation/mark (e.g. when interacting with a new client), a person holding this designation must do it as follows:
- 4.6.1. "I am a Fiduciary Practitioner of South Africa, a registered designation conferred by the Fiduciary Institute of Southern Africa"; or
- 4.6.2. "I hold the FP^{SA}® designation, a registered designation conferred by FISA®."
5. When in doubt about anything contained in this document, a member must obtain guidance from FISA® by sending a query to the FISA® secretariat at secretariat@fisa.net.za.