Financial Planning Institute of Southern Africa
THE PROFESSIONAL STANDARD

Institute of Retirement Funds Africa

ACTUARIAL SOCIETY OF SOUTH AFRICA

Retirement Conference hosted by the FPI in collaboration with IRFA and ASSA

Date: 27 July 2022

Duration: 08:55 – 15:45

Venue: Online via GoTo Webinar

CPD: 5.5 Verifiable CPD hours (4 Technical and 1.5 Ethics and Practice Standards)

Agenda

Time	Topic	Speaker
08:55	Welcome	Lelané Bezuidenhout, CFP®
09:00 – 10:00	Retirement Reform – member journey from Savings to Annuity	Stephen Walker (ASSA) Ryan McCaughey, CFP® Geraldine Fowler, CFP® - Chairperson of IRFA Facilitator: Lesego Mpete, RFP™ (GMI)
10:00 -10:30	Benefit counselling vs financial advice	David Kop, CFP®
10:30 – 10:45	Tea Break	
10:45– 11h45	Regulatory changes: Unpacking the regulatory process and the impact this has on the member journey.	Henré Prinsloo (ASSA) Andrea Bezuidenhout (ASSA) Nancy Andrews (IRFA) Ronald King, CFP® (FPI) Moderator: Lelané Bezuidenhout, CFP®
11:45 – 12:15	Globalisation and the impact on Retirement provision	Rex Cowley
12:15 – 12:45	Lunch	
12:45 – 13:30	Key issues that consumers battle with at retirement stage (Psychology as well as fears, bias's and real problems)	Kim Potgieter, CFP® Gugu Sidaki, CFP®
13:30 – 14:15	Two pot system: A practical perspective	Andrea Bezuidenhout (Alexander Forbes) Henré Prinsloo (ASSA) Geraldine Fowler, CFP® (IRFA)
14:15 – 14:30	Tea Break	
14:30 – 15h30	Annuities	Sydney Sekese, CFP®
15h30 – 15h45	Closing	

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