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Dear Member

As we move into a new fiscal year, CFA Society South Africa remains focused to deliver on its strategy and vision. As a growing Society with over 1800 members, a committed board, effective committees and passionate volunteers we look forward to continue delivering value to our members.

We are therefore, delighted to announce that members, who are both CFA Charter holders and members of CFA Society South Africa are now Commissioners of Oaths and may begin to perform the duties associated with this designation effective immediately.

For information and guidelines on becoming an ex officio Commissioner of Oath please go to the official government website: www.justice.gov.za/legislation/acts/1963-016.pdf

We have also negotiated a special rate if you would like to purchase a personalised Certification Stamp, compliant with CIPC. Go to rubberstamps.co.za and quote the unique code **RSD-DNJAWDUZE** to obtain your 20% discount.

As a Society we are aware that the CPD requirements for the new FAIS Fit & Proper regulations is front of mind and very topical in the investment industry. This is a focus of the Society and we are working towards a solution.

The FSCA has not yet finalised the requirements for professional bodies to register as CPD providers, but we are engaging them to ensure that CFA CE credits be recognised for CPD purposes, where appropriate. We will communicate progress on this matter as soon as possible. In the interim, we encourage members to continue gathering CFA CE credits, especially where relevant to their FAIS registration.

BOARD RECOGNITION

We bid farewell to two of our Board Members who have served their term with the Society. We thank them for their enthusiasm and dedication.

Ingrid Vermeulen became a Board member in 2014 and focused her efforts on Industry outreach projects. She initiated many of the collaborative efforts with other industry bodies, allowing us to have a more impactful voice in the investment industry.

Philip Bradford's service spans over 7 years including the President role and Chair of the Advocacy Committee. He has also become a certified CFA Ethics trainer and will continue to present CFA Ethics training workshops across Southern Africa.



Sept 2018

NEWSLETTER

CANDIDATE PREPARATION UPDATE

UNIVERSITY OUTREACH

University of Cape Town Career Day - 8th August
WITS Career Day - 20th August



PROGRAMME EVENTS

Section 12J Forum- Leaderex

4 September, Johannesburg
Sandton Convention Centre

Take part in the forum as the country's top thought leaders will unpack Section 12J funds, including the investment landscape, benefits, tax implications and more.

Register here

1 CE Credit

Portfolio construction in the age of digital advice

Join us for an informative presentation by Grant Locke, CFA and Head of OUTvest

12 September, Jhb
Sandton Sun

13 September, Cape Town
Breakwater Lodge

Register here

1 CE Credit

Wednesday Webinars @1

Join us for our month-end webinar, Silence is NOT Golden on the 26th September. Presented by Wendy Addison, LeisureNet whistle-blower and founder of SpeakOUT SpeakUP

1/2 CE Credit

Africa 2018 Investment Actuarial Society of South

30th August, Johannesburg
Maslow Hotel, Sandton

This year's seminar will focus on which technologies are influencing the South African investment industry and how to stay relevant in the international landscape.

Register here

CONTINUED LEARNING

Advanced Financial Modeler (AFM) exam member discount



Thank you to all the Volunteers who assisted at the various sessions; JD van Wyk, CFA, Caroline Cremen, CFA, Thomas Vardy, CFA, Franita Neuville, CFA, Martin Steenkamp, CFA, Musimuni Dowelani, CFA, Victor Seanie, CFA, McDonald Chigumba, CFA, Megan Bellinger, CFA, Gareth Visser, CFA, Eugene Visagie, CFA, Deon Brenner, CFA, Kudakwashe Korovedzai, Rashaad Tayob, CFA and Katy Murless

2018/2019 LOCAL UNIVERSITY RESEARCH CHALLENGE

We are proud to host the 10th local Research Challenge. This year we have a record number of universities participating and are delighted to have representation from our neighbouring African universities.

We would like to take this opportunity to thank all the volunteers who are involved in this initiative, your time and commitment is greatly appreciated.

The final will take place on the **16th of October**

How to Measure Advise and the Metrics for Success

Charlotte Beyer, Wall Street veteran, entrepreneur and wealth management specialist, will share her insights.

14 September, Cape Town
Breakwater Lodge

[Register here](#)

1 CE Credits

Women's Month High Tea in collaboration with ABSIP

Guest speakers and a panel will address the theme; *Gamechangers and Change Leaders, the Power of giving back*

20 September, Cape Town
Ginja Restaurant V&A Hotel

[Register here](#)

Financial Modelling Institute is pleased to offer a 20% discount on the registration fee for the self-study Advanced Financial Modeler certificate. [Register here](#) using promo code **CFASAOCT18**

MEMBER RENEWAL

Final Reminder -Renew your 2018/2019 Membership now to maintain your CFA designation
[Log in](#) now

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For further information and enquires contact Linda Hawkins, Executive officer.

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