

~ AWARDS ~

Natasja Norval Hart is FPI 2010 Financial Planner of the Year!

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The Financial Planner of the Year 2010 was announced at the Annual Financial Planning Institute of Southern Africa (FPI) Convention Gala Dinner at Emperors Palace, Kempton Park on 26 May 2010. This year's award went to Natasja Norval Hart, a CERTIFIED FINANCIAL PLANNER® professional who is an Executive Financial Planner at Consolidated in Randburg, Johannesburg. As a Financial Planning professional, the Financial Planner of the Year Award is the highest accolade a financial planner can obtain.

This is only the second time in the history of the award when a lady has won the award, with Debbie Netto winning the inaugural award in 2001. "This year we had 3 finalists who attended the final round panel interviews. It was a very close race which is a tribute to the high quality of financial planners we have in SA." said FPI Awards Committee Chairperson, Mr Paul Rabenowitz at the gala dinner. Finalists in the competition were Ms Pat Blamire from Chartered Wealth based in Johannesburg and Mr Jan-Carel Botha from Ultima Financial Planners based in Pretoria.

Natasja holds a B Com (Economics) and Advanced Post Graduate Diploma in Financial Planning and has an admirable eleven years industry experience. Her passion for finance started early on during her student years at the University of Pretoria where she obtained a B Com Economics degree in 1998. After successfully completing her studies, Natasja then brought in the new Millennium as a CFP® professional in 2000.

Natasja is well respected for her dedication to both work and studies. In 2002, she also achieved her Advanced Diploma in Financial Planning where she specialised in asset types and investment management. In 2008 she completed further studies by obtaining the Advanced Diploma in Financial Planning in estate planning and personal risk management. She has been a member of the Financial Planning Institute since 2000 and is currently a committee member for Education for the Johannesburg Central Region.

Natasja began her career at Citadel Investment Services in 1999 where she was involved in portfolio management and wealth preservation for high net worth individuals. Looking for more responsibility, growth and management opportunities, she made the move to Consolidated in 2002 as a financial planner.

At Consolidated, Natasja is currently head of advice for the Gauteng region. She manages a team of eleven people providing training, advice and leadership. In addition to this, she also consults to new and existing clients on various aspects of financial planning. As if this isn't enough to keep her busy, Natasja is also a member of the Consolidated Advice Forum which provides input and guidance on a national basis to Consolidated employees regarding technical matters and the advice environment. She has appeared as a guest speaker on television and at various exhibitions requiring guest speakers on the importance and role of financial planning in South Africa.

Jointly sponsored by the FPI, the magazine Personal Finance and the University of the Free State, the adjudication process started with the submission of a complex case study, prepared by an industry professional, and marked by four independent adjudicators who marked them individually without any collaboration. This constituted 45% of the total marks. This was followed by site audits of the applicants' practices by another five judges, which carried 35% of the total marks. The final stage was face to face interviews which took place in front of a four-member panel consisting of Board, senior members of the FPI and Personal Finance.

Accepting the award, Natasja said "I would like to thank the FPI for hosting such a professional and well organised competition. This competition is an opportunity to have the industry leaders review you as a planner and to learn from them. The learning curve is steep but the benefits are not only for the planner, but also for the practice and the clients. I would urge all financial planners to take the opportunity to enter this competition."

As the winner, Natasja will be profiled in Personal Finance as well as other media, is named as the FPI's CFP® professional Brand Ambassador, is awarded the FPI Financial Planner of the Year trophy, will be featured as an ambassador for the FPI over the next year giving regional talks and presentations and receives a trip to an international Financial Planning conference of choice as well as attendance at the next FPI Annual Convention.

The FPI also acknowledges the other finalists for the Financial Planner of the Year Award 2010:

Pat Blamire

Pat Blamire is a CFP® professional working at Chartered Wealth Solutions in Johannesburg. After completing her Advanced Tax Certificate and other studies, Pat joined the financial services industry in 2004. She was involved as a Principal Officer on a Retirement fund and then moved into consulting to institutional clients, and assisted trustees to set investment strategies for their funds. This was where she developed her passion for helping individuals. She completed her Advanced Post Graduate Diploma in Financial Planning, and in 2007, joined Chartered Wealth Solutions as a financial planner to individual clients.

After completing two Comrades Marathons, Pat understands the importance of setting goals for oneself. After many years of academic study, her love of the bush led her to complete her Field Guide qualification (FGASA Level 1) in 2008. Pat sees her participation in the Financial Planner of the Year competition as the next step in her ongoing quest to grow both personally and professionally.

Jan-Carel Botha

Jan-Carel holds a B. Com degree in Economics (UNISA) and a Post Graduate Diploma in Financial Planning (UFS). He is a member of the Financial Planning Institute (FPI) and a CFP® professional. Jan-Carel has been a fee-based professional financial planner throughout his career. He is part of the financial planning team at Ultima Financial Planners which is also home to a former FPI/Personal Finance Financial Planner of the year.

Jan-Carel has been a guest speaker on numerous platforms to the larger public on various topics of financial planning and also regularly features as co-host of *Wealth Through Financial Planning* on local radio station, Impact radio. His passion is to change the lives of people through sound financial planning and reaching their financial goals reliably over time. He firmly believes that the four pillars of a quality financial planner are: quality of experience, an ethical mind, good mentorship and quality of academic knowledge. It is these fundamentals that he believes have to be embraced and met by the profession to be truly recognised by the larger public as professional.