

- Top Wealth Manager: 2018
- People's Choice as Top Wealth Manager: 2017, 2018 & 2020
- Top Wealth Manager for Lump-sum Investors: 2018
- Top Wealth Manager for Young Professionals: 2018

Gradidge-Mahura Investments wins the FPI Approved Professional Practice™ of the Year 2021

We are proud to announce that Gradidge-Mahura Investments (GMI) won the sought after FPI Approved Professional Practice™ of the Year 2021. The annual awards ceremony was hosted on 25 October 2021 where several industry award winners were announced. After making the second round of the inaugural competition in 2020, GMI went one step further and won the overall award in 2021.

About the Financial Planning Institute of Southern Africa (FPI)

The FPI is the custodian of the globally recognised Certified Financial Planner® designation in Southern Africa. There are an estimated 4,800 CFP® professionals in South Africa of which an estimated 3,800 are practicing advisers. This is out of more than 100,000 financial advisers in South Africa in total. The vision of the FPI is professional financial planning for all. To this end the institute ensures that professional standards are clearly articulated and maintained. **The FPI's Code of Ethics and Professional Responsibility** clearly articulates what is expected of financial advisers and the financial planning practices that they represent.

The Code is comprised of three components:

1. The Principles of Conduct, which serve to describe the qualities that professional members should aspire to in practicing their profession.
2. Standards of Conduct, which set out how professional members should direct their conduct in practising their profession, while adhering to the Principles of Conduct and applying the Financial Planning Practice Standards.
3. The Financial Planning Practice Standards, which set out the process according to which professional members should practise their profession.

These three components are interdependent and none of them takes precedence over another in the interpretation of the Code.

In addition to upholding and practicing the codes, the FPI also considers aspects such as governance, community impact and financial education initiatives in choosing the Professional Practice of the Year. There are fourteen FPI Approved Professional Practices™ in South Africa, and GMI is proud to be in that number.

We would like to take this opportunity to thank you, our clients, for your ongoing support. Without you we have no reason to exist. We will continue to refine our advice and service processes with the objective of delivering professional advice and good financial planning outcomes for you.

Regards,

Gradidge-Mahura Investments Team