



Financial Intermediaries Association  
of Southern Africa

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## FIA TYGERBERG BRANCH ANNUAL GENERAL MEETING ON 21 FEBRUARY 2019 AT 09:00 AT RUSLAMERE, DURBANVILLE

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### **AGENDA**

- 08:30 Arrival, register, tea and coffee
- 09:00 **Opening and welcoming**
- 09:05 **FIA Member matters:**
- ✓ Present / absent / excuses
  - ✓ Declaration of any other interests
  - ✓ Approval of the previous AGM minutes
- 09:15 **Annual General Meeting:**
- ✓ Chairman's Report
  - ✓ Financial report
  - ✓ Election of the committee for 2019
- 10:00 **Life Stages of Stages of Life... Things we assume Clients know or do.**  
*Guest speaker: Derek Lottering, Marketing consultant at Old Mutual*
- 10:40 Break with tea and coffee
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- 10:45 Sign in for the CPD training
- 11:00 **CPD training** facilitated by Peter Atkinson, FIA National Technical Portfolio Manager  
**Regulatory Roundup** - *a summary of the key recent regulatory changes, a look at likely upcoming changes and some pointers as to how this could affect a brokerage.*
- 12:00 Sign out for the CPD training
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- 12:15 Meeting adjourned  
✓ *Lunch served*

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