



CAREER ENRICHMENT



Financial Planners Journey to South Africa

11 days / 8 nights

November 8-17*, 2021

**arrival back in U.S. on November 18*

\$6,999 (Based on double occupancy)

\$1,999 (single supplement)

Enjoy the unique culture and traditions of South Africa while you spend time exploring the cosmopolitan city of Cape Town and the capital city of Johannesburg. An optional safari post-program excursion will be offered on this itinerary.

Program Highlights

- ✓ 8-night (11 day) journey through **South Africa**.
- ✓ **Continuing Education credits** for Financial Planners will be sought for this journey through your leaders.
- ✓ **Accompanying guest program** – alternate activities will be provided for those not attending the meetings.
- ✓ An optional **Gondwana Game Reserve** post-program extension offered on this itinerary.

Focus on Community & Culture

- ✓ Embark on an exploration of the darkest years in South African history at the **Apartheid Museum** as well as a walking tour of the **South Western Township (Soweto)**.
- ✓ Talk to the people you meet on the street. You'll be delighted at how open to conversation the locals are, and you may surprise yourself with the new impressions formed.
- ✓ **Engage with the local community of Kliptown** and learn about people's lives in this area as well as the work being done to give children a brighter start in life.

Focus on Professional Interaction

- ✓ **Meaningful interaction and collaboration** with financial planners will provide a better understanding of the practice of personal financial planning and the development of the financial planning profession in South Africa through conversation with **local financial planners**.
- ✓ Learn about the **most prevalent financial challenges** facing South African families and the decisions they must make to plan for their future. Seek to gain an understanding of the financial institutions (bank, securities firms, insurance companies) serving them.

What's Included:

- 5* accommodations throughout
- All transportation and activities outlined in the itinerary
- Group transfers to and from the international airports
- International air to and from South Africa (gateway tentatively Washington, DC area)
- Local English-speaking guide
- Meals as mentioned and most tips

Not Included:

- Personal expenses at the hotels including room service and spa services
- Meals not specified
- Tips for national guide
- Passport renewal or issuance
- Domestic flight to gateway city



📍 **Washington, DC (IAD)**

DAY 1 – Monday, November 8, 2021
Depart for South Africa

Depart early this evening and make your way to **South Africa**.

With a dynamic fusion of African, European, and Asian influences, South Africa is a place of vibrant cultural diversity. Years after its emergence from apartheid, the nation has become a fascinating mix of history and modernity, of ancient traditions and new ideas.

📍 **Johannesburg, South Africa**

DAY 2 – Tuesday, November 9
Arrival in Johannesburg

Upon arrival at Johannesburg International airport, you will meet your local guide to transfer to the hotel.

Johannesburg is currently the largest city in Southern Africa with more than six million people and urbanization at 97%. It is a city of contrasts with wealthy suburbs and commercial centers alongside informal settlements, Indian bazaars and African *muti* (medicine) shops, where traditional healers dispense advice and traditional medicine.

Your delightful 5* hotel is situated in Sandton City. The **Sandton Sun Hotel** is connected to the Convention Center and guest rooms have a minibar, free Wi-Fi, pillow menu, climate-controlled rooms, Nespresso machines, onsite dining, rooftop pool, 24-hour gym, and a spa and wellness center.

Enjoy a **welcome dinner** this evening.

Overnight: Sandton Sun Hotel (or similar)
Included meals: Dinner



📍 **Johannesburg, South Africa**

DAY 3 – Wednesday, November 10

After breakfast, take part in an **orientation and welcome briefing** on South Africa. This comprehensive briefing covers an introduction to your local staff, some historical background, and current information on South African society and economy.

Immediately following, the group will have a speaker from an organization such as the **Financial Planning Institute** join the group to provide an overview of financial planning services in South Africa. This will provide an opportunity to ask questions and interact with their knowledgeable representative(s).

Lunch will be provided at a local restaurant.

Explore the darkest years in South African history at the **Apartheid Museum**. Likened to the Holocaust Museum in Washington, D.C., this haunting museum takes you into the beating heart of the struggle for freedom from apartheid, the grip of the National Party's regime during apartheid, and the giddy days of liberation.

Dinner is by individual arrangement (own expense).

Overnight: Sandton Sun Hotel (or similar)
Included meals: Breakfast & Lunch





📍 **Johannesburg, South Africa**

DAY 4 – Thursday, November 11
Professional Interaction

Meetings will be requested for this morning and afternoon with **local financial planners and wealth management professionals** such as Old Mutual (head office) representatives.

Mission: The primary professional objective of this journey is to seek a better understanding of the practice of personal financial planning and the development of the financial planning profession in South Africa through conversation with local financial planners.

Lunch will be provided at a local restaurant.

An afternoon meeting will be requested with a company such as **Livestock Wealth**. Livestock Wealth is a “crowd farming” platform that enables anyone to invest in cattle over a fixed term as they grow and earn income from the sale of the beef. Their team has a combined 70 years of experience in corporate, farming and new venture creation and their team creates value by producing the best quality cows to benefit their staff, farmers, investors, beef customers and the environment.

Guest program:

Guests will venture to Pretoria, South Africa’s political capital, filled with stunning architectural and cultural history. At the Voortrekker Monument, see an unparalleled view of the city and take a moment to reflect upon the importance and long-term repercussions of the actions of the first whites to conquer South Africa’s interior and northern territories. Later, visit Church Square and the Union Buildings, which are the seat of the South African national government and site of Nelson Mandela’s presidential inauguration.

Dinner is by individual arrangement (own expense).

Overnight: Sandton Sun Hotel (or similar)
Included meals: Breakfast & Lunch

📍 **Johannesburg, South Africa**

DAY 5 – Friday, November 12
Professional & Humanitarian Program

This morning the group will meet with financial professionals from the **National Stokvel Association of South Africa**. Continue your discussion about the most prevalent financial challenges facing South African families and the decisions they must make to plan for their future. Also gain an understanding of the financial institutions (bank, securities firms, insurance companies) serving South African citizens.

Guest program:

Guests will have some free time this morning to relax and will connect with the rest of the group for the afternoon humanitarian visit.

Lunch will be provided this afternoon.

This afternoon the group will explore **Soweto** with your charming local guide, Ntokozo Due (TK for short). Start off at the **Kliptown Museum** on Walter Sisulu Square to learn about the dramatic and important history of apartheid as well as the history, customs and traditions of the township. A highlight of your explorations this afternoon is a visit to the inspirational local NGO, **Soweto Kliptown Youth**, and their community center. Time permitting, visit the house-museum of local historian Oom Bolo with his stories of the 120-year history of the area and life under apartheid.

Dinner will be provided at a local restaurant.

Overnight: Sandton Sun Hotel (or similar)
Included meals: Breakfast, Lunch & Dinner





📍 **Cape Town, South Africa**

DAY 6 – Saturday, November 13
Fly to Cape Town & Table Mountain

Check out of your hotel after breakfast and head back to O.R. Tambo International Airport in Johannesburg. Fly to the southern city of **Cape Town** late this morning. The oldest port in southern Africa, Cape Town is regularly heralded as one of the most beautiful cities on earth. Tucked into the arms of a broad bay, it is surrounded by white-sand beaches. Cape Town's Mediterranean look and feel attracts visitors from around the world, and it was the first place settled by European settlers, entrepreneurs, and religious refugees.

Lunch is on your own today if not included in your flight to Cape Town. *Options available at the airport.*

The **Radisson Blu Hotel** is a seaside hotel located close to the city center. Enjoy the striking ocean views and wake to the sound of gentle waves breaking on the shore before embarking on a day of exploration. *They have a complimentary shuttle bus to and from the Victoria & Alfred Waterfront – a popular shopping, dining and entertainment area.*

If *weather permits*, you will have the opportunity to ascend **Table Mountain** via a revolving aerial cable car this afternoon. This iconic symbol of Cape Town is a UNESCO World Heritage Site offering stunning views of the entire Cape Peninsula, the Atlantic and Indian Oceans, Cape Town, and the harbor.

Dinner is by individual arrangement (own expense).

Overnight: Radisson Blu (or similar)
Included meals: Breakfast



📍 **Cape Town, South Africa**

DAY 7 – Sunday, November 14
Cape Point Tour & Botanical Gardens

Spend the day with fellow travelers enjoying the sights in and around Cape Town. Explore the countryside via a motor coach tour of the **Cape Peninsula** all the way to the **Cape of Good Hope** (Cape Point) in Table Mountain National Park. Extraordinary care has been taken to protect this lush reserve of indigenous flora and fauna, and the striking natural beauty of the area makes it a destination for both foreign and local visitors.

Lunch will be provided this afternoon.

After lunch, stop to see the rare **African penguins** in their natural surroundings at Boulders Beach. There are few places in the world where you can get this close to a breeding colony of penguins and you'll get a firsthand look at these flightless birds as they roam freely around the area.

On the way back to town, stop to take a walk through the **Kirstenbosch National Botanical Gardens** to see some extraordinary indigenous plants.

Dinner is by individual arrangement this evening. You might check out the **Victoria and Alfred Waterfront**, which features magnificent sea and mountain vistas as well as exciting shopping and entertainment venues, cafés, restaurants, and markets.

Overnight: Radisson Blu (or similar)
Included meals: Breakfast & Lunch





📍 **Cape Town, South Africa**

DAY 8 – Monday, November 15
Professional Exchange

Today is set aside for continued professional interaction with your counterparts. Meet today with **local financial planners** who are experts in estate planning, retirement, budgeting, succession planning, lending & finance, risk management as well as small and medium business advice. Learn more about how individual citizens invest and gain an understanding of the financial markets and economy.

Lunch will be provided at a local restaurant.

This afternoon, a meeting is requested with the Business Management faculty at the **University of Stellenbosch** (*or similar*) to discuss the education and training of financial planners in South Africa. Completion of the university's program allows students to write the entrance examination of the internationally recognized CFP® (Certified Financial Planner) qualification. Discuss the program and meet with students, if available, to learn about their plans for the future and specialty they are headed into.

Guest program:

Guests will visit Bo-Kaap, the only area in the city of Cape Town where the Cape Malay community was not forcibly removed under Apartheid. It is a bright and colorful area, one of the most photographed places in Cape Town. Enjoy a walk around the area and visit a spice shop before heading into a home of one of the ladies in the area. The Cape Malay cuisine is the oldest cuisine of the Cape, having been evolved by the Malay slaves who worked in the kitchens of their Dutch masters. Participate in the making of a delicious meal and learn more about this local culture. Enjoy some time free late this afternoon to explore the waterfront. The V&A Waterfront is Cape Town's premier retail, dining and entertainment precinct.

Dinner is by individual arrangement (own expense).

Overnight: Radisson Blu (or similar)

Included meals: Breakfast & Lunch

📍 **Cape Town, South Africa**

DAY 9 – Tuesday, November 16
Cape Winelands Tour

Travelers will escape to the **Cape Winelands**, where breathtaking vistas, majestic mountain backdrops, rolling vineyards, and quaint Cape Dutch homesteads characterize the famous and award-winning wine estates. Savor the rich history and culture of Stellenbosch, an historic Dutch colonial town now home to one of the country's best universities. Your explorations today will include a cellar tour and a wine tasting in the area wineries.

Also visit **Franschoek**, a valley originally settled by French Huguenot refugees who brought with them their wine and food culture.

Lunch will be provided this afternoon at a local winery.

Return to Cape Town late this afternoon with some time to relax before dinner.

Say goodbye as you reflect and share memories over a farewell dinner at a local restaurant.

Overnight: Radisson Blu (or similar)

Included meals: Breakfast, Lunch & Dinner





📍 Departure

DAY 10 – Wednesday, November 17
Departure

Fly back to Washington, DC today with arrival the following morning (Thursday, November 19). The morning is yours to explore independently and prepare for hotel check-out.

Depending on flight time, lunch is on your own this afternoon with meal service provided on your international flight home.

Included meals: Breakfast

📍 Arrival

DAY 11 – Thursday, November 18
Arrival in US

Arrive back in the U.S. this morning to connect to your flight home.





📍 Johannesburg, South Africa

Sandton Sun Hotel

Corner Alice Lane and Fifth Street
Sandton, Gauteng 2146
South Africa

Telephone: +27-11- 780 5000

<https://www.tsogosun.com/sandton-sun-hotel>



📍 Cape Town, South Africa

Radisson Blu

100 Beach Road, Granger Bay
Cape Town, Western Cape 8001
South Africa

Telephone: +27-21- 441 3000

<https://www.radissonhotels.com/en-us/hotels/radisson-blu-cape-town-waterfront>

