



UFS School of
Financial Planning Law
presents the 2nd

Financial Planning Day for Practitioners



Date: 23 June 2023 | Time: 14:00 to 16:00
Venue: Online | CPD points: 2 General

T: +27 51 401 2823 | E: SFPL@ufs.ac.za | www.ufs.ac.za/sfpl

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FINANCIAL PLANNING LAW

The speakers and topics

Mr Hendrik Crafford

Topic: Put the Spark into review meetings. (14:00 – 14:30)

The financial coaching artist and director of Craffies Coaching, **Hendrik Crafford** will present the topic. With over 30 years of experience in the insurance industry, Hendrik's experience enables him to share and coach planners pragmatically. His unique Purpose-Driven Financial Coaching Process integrates Ontological Coaching (a branch of philosophy that studies existence, being, and becoming) and Life Planning (Financial planning focusing on the client's purpose, story and life.)

Dr Prince Sarpong

Topic: Financial Therapy: Are we taking the behavioural side of financial planning too far? (14:30 – 15:00)

This topic is presented by **Dr Prince Sarpong**, CFP®, a Senior Lecturer at the UFS School of Financial Planning Law. He holds a PhD, an MCom in Finance, a Postgraduate Diploma in Financial Planning, and a Bachelor of Education (Psychology). He is the author of *Portfolio Management for Financial Advisors*, a book published in 2020, and the editor of a forthcoming book, *Theories and Practices in Financial Therapy*. His main area of research is in financial market behaviour, and he has published several papers in international peer-reviewed journals.

Prof Liezel Alsemgeest

Topic: The link between financial socialisation, money scripts and financial conflict. (15:00 – 15:30)

Prof Liezel Alsemgeest, Director of the UFS School of Financial Planning Law, started her career as a junior lecturer at the University of the Free State Department of Business Management in 2006. She completed her PhD in 2011 and also holds a Postgraduate Diploma in Financial Planning Law. She is the programme director for the Postgraduate Diploma in Investment Planning and the Postgraduate Diploma in Estate Planning. Prof Alsemgeest is a Certified Financial Planner professional (CFP®) and a member of the Financial Planning Institute of Southern Africa. Her main area of research and passion is the subject area of personal finances and internal finance.

Dr Mary Martin

Topic: Debunking myths about the brain. (15:30 – 16:00)

Dr Mary Martin is a passionate futures thinker, systems thinker and mindfulness educator. She loves designing learning experiences and has been a writer/editor for decades. She has also been an ethical vegan for decades.

- Mindfulness Educator. Gold-standard training (certified by Brown U, Mindful Schools, & David Treleaven) and over a decade of experience teaching all ages, as well as keynoting and workshops at conferences.
- Writing/Editing. Ghostwriter of dozens of nonfiction books. Content ranging from educational to financial to human behavior to futures thinking. Dozens of articles, white papers, website content, and stakeholder reports. State and federal grant writing and reviewing.
- Facilitator/moderator/presenter. Topics include: The Attention Economy, mindfulness, listening, wellbeing, Emotional Intelligence, inquiry, leadership.
- Futures thinker. Award-winner futures thinker specializing in The Future of Connection and Well-Being.

**To register, send an email with the subject line
“Financial Planning Day” to SFPL@ufs.ac.za**