

## Meet the FPI Financial Planner of the Year



Established in 2000, the FPI Financial Planner of the Year Award is highly coveted and recognises outstanding achievement in the field and practice of financial planning. In 2025, the award went to Nicola Langridge, CFP®, wealth manager at Private Client Holdings. Blue Chip caught up with her.

By Financial Planning Institute (FPI) | 11 March 2026



Nicola Langridge CFP® Wealth Manager at [Private Client Holdings](#)

The FPI Financial Planner of the Year (FPotY) competition is designed to honour the country's leading CFP® professional and is, by nature, rigorous and demanding. All nominees were required to satisfy a comprehensive set of criteria and subsequently to demonstrate their expertise and talent through innovative ideas, superior skills and uncompromising ethical standards in client engagements.

### **Congratulations on your achievement, Nicola! What does winning the FPI FPotY Award mean to you?**

Winning the award is an amazing achievement. It makes me feel that all the hard work I have put in over the last few years has been worth it and it is recognition that I am on the right path. I am passionate about empowering young professionals to join the profession and people, especially women, to take their finances more seriously. This award provides a platform to become more involved with consumer education and to encourage more young professionals to join the CFP® profession.





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## **What has been the highlight of your career (besides winning the award)?**

A highlight of my career would be when I moved from an operational role into wealth management. I finally felt like I had found my passion. It is always a nerve-wracking move relocating from the back office into a space of having to bring on and deal with clients. It is a great feeling when you get there, and it works.

## **What changes would you like to see in the profession?**

I would like to see more people completing the Post-graduate Diploma in Financial Planning and obtaining their CFP® designations. There's a big difference in the quality and consistency of advice between CFPs® and those people who haven't followed the proper process or some of the influencers out there. I am not saying that all of them are bad but sometimes there is inaccurate information disseminated that makes clients unnecessarily nervous. I would like to see more CERTIFIED FINANCIAL PLANNERS® because the more certified planners we have, the more people in South Africa will receive quality advice and can be taught how to manage their finances effectively.

## **As this year's FPI professional brand ambassador, how will you use the platform to motivate change?**

Through my other passion, which is public speaking. My aim is to join platforms that reach the public such as the FPI's MyMoney123 and the various initiatives that the FPI has. I want to get involved with as many different forums and platforms as possible to get the word out there.

## **What is your objective as the FPI ambassador?**

I feel strongly about women taking ownership of their financial affairs; women who have not necessarily always done that and to empower more people to join the profession. Sometimes the profession seems a bit daunting to people and I would like to provide them with more insight into the profession. I am always happy to mentor people, so those advisors who are wanting to take the next step into CFP® or students wanting to move into the profession, please feel free to contact me via LinkedIn and we can arrange a video call. I believe it is vitally important for those of us with more experience to give guidance to those who are still trying to decide as to whether this profession is the right one for them. So, education and mentorship will be my focus during my tenure.

## **How should the profession improve clients' experience of financial planning and their financial planning outcomes?**

Over the past couple of years, there has been a movement towards behavioural psychology. Financial planners should make sure that they are bringing the money



personality and behaviour behind the finance to their clients. If they are not and are only focused on the technical side of money, they are not working on the holistic financial wellness of the client. If the financial planner doesn't understand the client and puts them into a solution that doesn't match their money personality, the client will not understand the rationale behind the goals and will lose motivation in following a plan.

I spend a lot of time in my initial meetings trying to get to know the client, to really understand how they feel about investment and why they have certain goals. We, at Private Client Holdings, focus very much on a goals-based approach with clients.

It is very good to see a lot of the other companies starting to adopt this approach as well. If you set financial goals with your client and understand the psychology behind each of those goals, the plan that you put together is more effective, especially in terms of your client's discipline in adhering to the plan.

### **How has winning the award affected your work with your colleagues and within the company?**

I work in a close-knit team of 11 members. We have a previous FPI FPotY in the team; Mark MacSymon, CFP®, won in 2017. He has been a great mentor to me. As this is not Private Client Holdings' first rodeo with a FPotY in the company, the support from the team has been great.

My colleagues flew with me to Johannesburg for the announcement of the award and have shown support in many ways, so I do not think that there will be any major change. The backing that I have had has been wonderful and it is a relief to know that if there are more engagements this year that I have the support at the office to make sure my clients are still 100% taken care of. It is something we take seriously.

### **Please share a message of motivation for those considering entering the FPI FPotY Award.**

Do it! It is worth it. It is an extremely difficult process to go through. I wasn't quite prepared for the immense pressure when I started. As the other two finalists this year, Brendan Dunn, CFP®, and Theoniel McDonald, CFP®, will attest to, the process of entering makes you evaluate yourself as well as your practice and outlook with clients. It is a great experience to see where you are at and to learn more about yourself. Every financial planner should enter the award at some point in their career.



For more details about Nicola, scan here.