

**QUALIFICATION: CERTIFICATE IN FINANCIAL PLANNING (SAQA I.D. 62810, Old DSBI: 57998)**  
**MODE OF DELIVERY: DISTANCE LEARNING (NQF LEVEL 5)**

### DESCRIPTION

The Certificate in Financial Planning is a SAQA-registered, Council on Higher Education (CHE) conditionally accredited insurance qualification. The primary purpose of the Certificate in Financial Planning is to equip students with the knowledge and skills they need to operate ethically and responsibly as financial advisers, and to be able to respond to the challenges of the economic environment and the changing nature of the financial services industry.

The Certificate in Financial Planning appears on the Financial Services Board's (FSB) list of recognised qualifications for FAIS Fit and Proper purposes. In terms of this rating, the qualification is considered to be relevant to all product categories as a generic (G) qualification, while rated as specific (S) in categories 1, 3, 4, 5, 7, 14, 17, 18 and 19. This means that students who have completed this qualification may receive exemption for some of the FSB's Regulatory Examinations in the categories where it was rated (S).

### ADMISSION REQUIREMENTS

A knowledge, comprehension and application of the English language at NQF level 4 (Grade-12 or equivalent level) is required. In order to determine the curriculum for which a student may register, the Milpark Business School point system applies.

If you matriculated in 2007 or earlier			If you matriculated in 2008 or later	
Symbol	Higher Grade	Standard Grade	NSC Result	Points awarded
A	8	6	90-100%	8
B	7	5	80 -89%	7
C	6	4	70-79%	6
D	5	3	60-69%	5
E	4	2	50-59%	4
F	3	1	40- 49%	3
			30- 39%	2
			0-29%	1
The certificate point system applies to students who have a matriculation certificate: a student who achieves more than 13 points may be admitted to the Certificate in Financial Planning.			Minimum 17 points on the points system: an achievement rating of 3 (40-49%) or better for two of the compulsory subjects and a rating of 2 (30-39%) or better for any other four subjects.	

RPL access: Mature age applicants and applicants with non-South African school-leaving qualifications or previous tertiary education experience, will be considered individually by the

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Director. Students who do not hold a South African matric certificate, need to apply for verification of equivalence with the South African Matriculation Board before entrance can be granted onto the qualification.

A student who is employed as a financial intermediary, broker, agent or who has been employed by a financial institution in the insurance or banking sector for a minimum period of one year *and* who is in possession of a matriculation certificate may be admitted to the qualification without application of the points system.

Foreign applicants whose first language is not English may be required to provide proof of proficiency in English prior to admission to the qualification.

Completion of the Long-term Category C FAIS 1 Assessment, either through INSETA/UNISA or Milpark Business School, allows students who do not have a matric certificate access to the Certificate.

## **CERTIFICATION**

On successful completion of the qualification, the graduate will receive the Certificate in Financial Planning, NQF level 5.

## **EXIT-LEVEL OUTCOMES**

On completion of Milpark Business School's Certificate in Financial Planning, the qualified graduate should be equipped with the foundational knowledge and practical skills required for a career in the field of financial planning and banking, and an appropriate knowledge base in preparation for further learning.

## **PROGRAMME OUTLINE**

### **Modules offered**

The qualification consists of six modules, one of which is an elective:

### **COMPULSORY MODULES**

Law for Financial Planners  
Basic Principles of Personal Financial Planning  
Basic Principles of Business Financial Planning  
Financial Planning Income Tax  
Financial Planning Products

### **ELECTIVE MODULES**

Relationship Marketing for Financial Planners; OR  
Basic Principles of Banking; OR  
Medical Schemes Environment; OR  
Wills and Administration of Deceased Estates.

Students who have completed the unit standard-based Long-term Category C2A or C2B module will receive an exemption for the elective module. Students who have completed relevant modules on other Higher Education qualifications may apply for exemptions where applicable.

## **ASSESSMENT**

Students are required to submit an assignment on each module by the assignment due date, which contributes 30% towards the final mark. Students will write a final summative assessment at the end of each semester, which contributes 70% towards their final mark. Students need to obtain a sub-minimum mark of 40% in the final summative assessment and an overall mark of 50% in order to pass the module.

## **DURATION**

The minimum duration of the qualification is one year, and the maximum duration is five years.

## **FURTHER STUDIES**

Students who have completed this certificate may progress (articulate) to the National Certificate: Financial Planning offered by Milpark Business School, or alternatively to the Bachelor of Commerce degree.

## **ABOUT THE BUSINESS SCHOOL**

Milpark Business School offers a range of tertiary qualifications, conditionally accredited by the Higher Education Quality Committee (HEQC) of the Council on Higher Education (CHE). Milpark Business School offers both distance-learning and contact-learning options, and workshops. The qualifications range from an MBA and a Bachelor of Commerce in Banking Management to Certificate and Diploma programmes.

## **PRICING**

Course fees include study material and one assessment. Please contact one of our campuses for more information.

## **DISCLAIMER**

The content of this brochure, accurate at time of going to print, is subject to change without notification because of legislation, market requirements or any other reason. Milpark Business School reserves the right to change the programme content without notice.

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