

SHORT COURSE CERTIFICATE IN ESTATE PLANNING, TRUSTS AND TAXATION

DESCRIPTION

This short course serves as an introduction to three key components of the fiduciary services environment: estate planning, trusts and taxation. On completion of the course, the learner will have a good understanding of the main principles of estate planning, the drafting of Wills, different types of trusts, the importance of succession planning and the tax implications of estate planning.

This short course is suitable for learners employed in the fiduciary services sector, in an advisory or in an administrative role. It is suited to learners who do not have the relevant training, accreditation or qualifications required to operate in the fiduciary services environment.

ADMISSION REQUIREMENTS

A knowledge, comprehension and application of the English language at NQF level 4 (Grade 12 or equivalent level).

CERTIFICATION

On successful completion of the programme, the learner will receive a Short Course Certificate in Estate Planning, Trusts and Taxation from Milpark Business School. This short course is presented at NQF level 6.

EXIT-LEVEL OUTCOMES

The qualifying learner should be able to:

- Explain the estate planning process and apply the process to the circumstances of a particular client.
- Make recommendations on the testamentary provisions of a client.
- Explain the working and application of the Administration of Deceased Estates Act.
- Explain the working of limited interests and determine the value of these interests.
- Explain the working of a trust with reference to the creation and operation of a trust and the parties involved.
- Apply the principles of donations tax in order to calculate the tax due in particular circumstances.
- Apply the principles of the Estate Duty Act to the circumstances of a particular client.
- Identify and determine the impact of capital gains tax on the estate of a client.
- Explain different estate planning techniques with reference to the saving of estate duty.

PROGRAMME OUTLINE

Estate planning: an introduction

Distribution of assets by Will

Administration of deceased estates

Limited interests

Trusts

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Donations tax
Estate duty
The impact of capital gains tax on estate planning
Estate planning techniques
Estate planning – practical application

ASSESSMENT

Learners are required to submit an assignment, which contributes 30% towards the final mark. Learners will write a final summative assessment, which contributes 70% towards the final mark. Learners 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

This is a five-day, full-time short course. It can be presented full-time or part-time.

FURTHER STUDIES

Learners who have completed this short course certificate can articulate to other short courses and potentially to other Milpark Business School whole qualifications.

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 a BCom in Banking Management to a variety of certificate and diploma programmes.

PRICING

Course fees include lectures and course material. 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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