

SHORT COURSE CERTIFICATE IN INVESTMENT MANAGEMENT AND PERSONAL FINANCIAL PLANNING

DESCRIPTION

This short course offers an in-depth examination of matters pertaining to investment planning. As an introduction, an overview of the South African economy is provided. General investment concepts are addressed and the different avenues of investment are considered in detail.

This short course is suitable for students employed in the wealth management sector.

ADMISSION REQUIREMENTS

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

CERTIFICATION

On successful completion of the programme, the student will receive the *Short Course Certificate in Investment Management and Personal Financial Planning* from Milpark Business School. This short course is presented at NQF level 6.

EXIT-LEVEL OUTCOMES

On completion of Milpark Business School's *Short Course Certificate in Investment Management and Personal Financial Planning*, the qualifying student should be able to demonstrate an understanding of the South African economy, its relationship to investment, as well as the different asset classes available.

PROGRAMME OUTLINE

The Economic framework
Elements of the South African financial system
Financial Advisory and Intermediary Services Act
Investment criteria
Capital and money markets
Foreign exchange, exchange control and foreign tax issues
Derivatives
Options
Futures
Asset allocation

ASSESSMENT

Students are required to submit an assignment, which contributes 30% to the final mark. Students will write a final summative assessment at the end of the workshop week, which contributes 70% to the final mark. In order to pass the short course, students need to obtain at least 40% in the final summative assessment and an overall mark of at least 50%.

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DURATION

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

FURTHER STUDIES

Students who have completed this short course certificate may articulate onto other short courses. Depending on the student's academic background, other Milpark Business School whole qualifications may also be available to the student.

ABOUT THE BUSINESS SCHOOL

Milpark Business School offers a range of higher education qualifications, 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, as well as supporting workshops. The qualifications range from an MBA and 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 due to legislation, market requirements or for any other reason. Milpark Business School reserves the right to change the programme content without notice.

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