

**QUALIFICATION: FINANCIAL PLANNING PRODUCTS FPPR01-OS**  
**MODE OF DELIVERY: ONLINE**

## DESCRIPTION

### PROGRAMME PURPOSE

Do you need to fast-track your understanding of financial services products to advance your career?

The purpose of this course is to provide you with:

- an overview of the main role-players in the financial services sector.
- an understanding of financial planning needs.
- an understanding of financial planning products as well as their features and benefits to match these needs.
- innovative trends in product development in response to changing client needs.

This course is an introductory level course aimed at individuals who are new to the financial services industry or those who want to improve their understanding of financial planning products and services available in order to advance their career in the financial services industry, either in a supportive, administrative, managerial or advisory role. The course is also suitable for individuals who want to prepare themselves for further study in the field of financial planning.

Completion of the course carries 23 CPD points for knowledge plus one CPD point for Ethics awarded by the Financial Planning Institute of Southern Africa. Successful completion of the assessments carries another one CPD point.

This course will benefit you if you:

- are considering embarking on a career in the financial services industry or in financial planning and want to increase your knowledge of the financial services industry and its products.

- work in any of the following supportive, administrative or managerial roles at a financial services provider and want to increase your knowledge of financial planning needs and the range of products available in the financial services industry:
  - Information technology department
  - Human resources department
  - New business/Underwriting/Claims processing department
  - Client services/Call centres
  - Sales support department.
- are studying towards a degree in financial planning and want to increase your knowledge of the underlying financial products available to a financial planner.

## **PROGRAMME OUTCOMES**

Once you have successfully completed this course, you will be able to:

1. Identify the main role-players in the financial services industry and explain their roles.
2. Demonstrate a basic understanding of the regulatory landscape governing the financial services industry.
3. Describe the risk and investment financial needs of individuals.
4. Describe the main features and benefits of a range of financial planning products and be able to match these products with financial needs.
5. Describe new trends in product development in response to changing client needs.

## **PROGRAMME STRUCTURE**

The following topics are covered in the course:

- Introduction to the South African financial services industry and financial planning
- New trends in product development
- The need for financial planning
- Risk financial planning products
- Investment financial planning products
- Retirement financial planning products.

## **MODULE DESCRIPTIONS**

Online Short Course: Financial Planning Products FPPR01-OS

## **ADMISSION REQUIREMENTS**

This course has open enrolment. Literacy at an NQF Level 3 or equivalent is recommended.

## English proficiency

Applicants are required to be proficient in English prior to admission to the course. Applicants whose first language is not English may be required to provide proof of proficiency.

## ACCESS TO TECHNOLOGY

Milpark provides students with materials, resources, formative assessments (including online tests and quizzes), discussion opportunities and a number of administrative services as part of the *myMilpark* and *myCourses* online tuition and support environments. Course materials direct students to additional external resources in the form of links to downloadable documents, websites and videos.

Having access to the above online facilities is essential for efficient communication, learning and success. You will need continuous (daily) access to study, using the resources mentioned above, and to submit and receive your assignments.

## Minimum system requirements

1. Reliable internet connection with continuous access
2. Firefox/Internet Explorer/Chrome web browser
3. Microsoft Word
4. The means to open and read PDF documents
5. The means to scan and upload documents
6. Email/cellphone for notification and communication.

## STUDENT SUPPORT

### Library access

The Milpark Library now provides access to e-books in a virtual library called Cyberlibris (Scholartext). Lecturers may create smart bookshelves per course or module for students to access (these shelves can contain prescribed and recommended books). Students can also create their own personal smart bookshelves containing resources for their studies. Having access to a digital library means that thousands of students can access books and resources from anywhere at the same time online. There is no need to make reservations and requests, and no limit to the time a student has to access a book. With the implementation of Cyberlibris, students also have access to full-text resources via ProQuest (global), Ebsco (global) and Sabinet (South African publications), to assist with research and to enrich their learning experience. Access to the Library is included in the module fee.

## **Tutor**

Comprehensive student support services are available. Students are provided with administrative support by Student Services. To assist with understanding content, students have access to tutors whom they can contact individually. Students who experience study and/or personal problems have access to a student counsellor. All support services are available to registered students via *myMilpark (myCourses)*.

## **ASSESSMENT**

An integrated approach to assessment is applied. The practical nature of the course is emphasised in all assessments.

The following are examples of assessments/activities that you could be exposed to during your course:

- Online quiz or online test
- Individual and/or group assignments with open-ended questions
- Online discussion forums with other students and your course lecturer
- Watching videos and summarising the main points
- Reading and engaging with study material, articles or information on websites
- Researching a specific topic and summarising your findings.

The exact structure of your assessments will be communicated to you in a detailed assessment plan when the course commences. A minimum final mark of 50% will be required in order to complete the course successfully.

## **DURATION**

This course will run over a period of six weeks, running from Tuesday to Monday every week.

## **CERTIFICATION**

A short course certificate of completion will be issued, provided that you meet the minimum requirements for certification for this specific course.

## **FURTHER STUDIES**

Students who have successfully completed this short course certificate may articulate onto other short courses. Students may at any time apply for admission to any of Milpark's further or higher education qualifications, where they may be admitted, subject to the admission requirements of each qualification.

## PRICING

The course fees include access to the online environment (including library services) for the full duration of the course, all study material, access to the lecturer online and one cycle of assessments.

## DISCLAIMER

The content of this brochure is accurate at the time of going to print. Milpark Education reserves the right to change the course content due to changes in legislation, market requirements and other reasons. Notice of such changes will be published on our website.

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