



RE

FRAME

YOUR FUTURE

FINANCIAL PLANNING  
& INSURANCE

MILPARK  
EDUCATION  
Financial Planning  
& Insurance

M

PROUDLY PART OF  
STADIO  
MULTIVERSITY

FPI  
Financial Planning  
Institute of Southern Africa  
THE PROFESSIONAL STANDARD

iISA  
The Insurance Institute  
of South Africa

## Qualifications & career path

NQF8

### Postgraduate Diploma in Financial Planning

CERTIFIED FINANCIAL PLANNER®  
Practitioner, Professional Wealth Manager,  
Professional Financial Planner, Entrepreneur

NQF7

### Bachelor of Commerce with a major in Financial Planning

FINANCIAL SERVICES ADVISOR™, Wealth Management Assistant, graduate trainee in Financial Planning, Para-planner, Management position in Financial Planning (e.g. Sales Manager, Business Development Manager), Practice Manager

### Bachelor of Commerce with a major in Short-term Insurance

Graduate trainee in Short-term Insurance, specialist or management position in Short-term Insurance including: Risk Manager, Underwriting Manager, Sales Manager

NQF6

### Advanced Certificate in Financial Planning

FINANCIAL SERVICES ADVISOR™,  
Para-planner, Financial Adviser

### Advanced Certificate in Short-term Insurance

Insurance Broker, Claims & Underwriting Specialist, Insurance Officer

NQF5

### Higher Certificate in Financial Planning

REGISTERED FINANCIAL PLANNER™,  
Financial Planning Administrator, Client Relationship Consultant, Wealth Management Administrator, Financial Adviser

### Higher Certificate in Financial Products

Financial Advisor, Financial Planner Assistant

### Higher Certificate in Short-term Insurance

Insurance Broker, Claims & Underwriting Administrator, Services Representative, Insurance Sales Consultant

NQF4

### Certificate in Financial Products

Financial Advisor, Financial Planner Assistant

## Message from the Dean



We provide students with a complete qualification path in financial planning and insurance.

We want to journey with our students as they achieve their career goals. Knowing that many of our students need to balance studies with other daily demands, we are constantly looking for better ways to provide suitable support to the student-on-the-run.

We pride ourselves on delivering students who are able to successfully complete the CFP® Professional Competency Exam or who may become a Fellow of the Insurance Institute of South Africa.

Whether you only need a qualification to be compliant with the FAIS Act, to provide you with an introduction to the fields of financial planning and insurance, or whether you want to become a professional financial planner or insurance specialist, we offer a qualification to suit your needs.

**Marilize Putter**

# Course details - Short-term Insurance



## ALIGNMENT WITH THE INSURANCE INSTITUTE OF SOUTH AFRICA (IISA)

### QUALIFICATION

QUALIFICATION	NQF Level
Higher Certificate in Short-term Insurance	5
Advanced Certificate in Short-term Insurance	6
Bachelor of Commerce with a major in Short-term Insurance	7

## ALIGNED WITH THE QUALIFICATION REQUIREMENTS FOR THE DESIGNATION OF

- Licentiate (LIISA)
- Associate (AIISA)
- Fellow (FIISA)

## BACHELOR OF COMMERCE WITH A MAJOR IN SHORT-TERM INSURANCE (NQF LEVEL 7, SAQA NO 90509)

### Mode of delivery:

Distance Learning  
Distance Learning Online  
Contact Learning (Melville)

### Year 1

- Induction to Business Studies
- Principles of Microeconomics
- Principles of Accounting
- Introduction to Business Management
- Legal Framework
- Business Numeracy
- Principles of Macroeconomics
- Applied Financial Accounting
- Business Law
- Personal Lines Insurance

### Year 2

- Intermediate Microeconomics
- Marketing Management Practice
- Commercial Lines Insurance
- Management & Leadership
- Liability Insurance
- Short-Term Insurance Environment

### Year 3

- Economics 3A
- Business Management 3A (General Management)
- Risk Management
- Reinsurance
- Advanced Insurance Products
- Case Study
- Commercial Property & Business Interruption Insurance

### This qualification is suitable for:

- Persons who require a strong foundation in general business principles and the required accounting, marketing, economics and quantitative skills. The additional modules allow candidates to acquire detailed knowledge of the key principles, rules and theories that underpin the short-term insurance industry.
- Persons wanting to apply for the designation of a Fellow (FIISA) awarded by the IISA.

## ADVANCED CERTIFICATE IN SHORT-TERM INSURANCE (NQF LEVEL 6, SAQA NO 97779)

### Mode of delivery:

Distance Learning

- Liability Insurance
- Risk Management
- Short-Term Insurance Environment
- Commercial Property & Business Interruption Insurance

### Choose TWO electives from:

Reinsurance, Marketing Management Practice or Management & Leadership, Motor Insurance.

### This qualification is suitable for:

- Persons wanting to specialise in the short-term insurance industry.
- Persons wanting to apply for the designation of Associate (AIISA) awarded by the IISA.

## HIGHER CERTIFICATE IN SHORT-TERM INSURANCE (NQF LEVEL 5, SAQA NO 83526)

### Mode of delivery:

Distance Learning

- Legal Framework
- Personal Lines Insurance
- Commercial Lines Insurance
- Risk Management

### Choose TWO electives from:

Marine Insurance & Aviation Insurance Construction, Engineering or Business Management, Introduction to Underwriting, Relationship Management in Short-term Insurance.

### This qualification is suitable for:

- Persons wanting to enter the short-term insurance industry.
- Persons requiring a full qualification for the purpose of the FAIS Act.
- Persons wanting to apply for the designation of Licentiate (LIISA) awarded by the IISA.

**Reframe  
Your Future  
with Milpark  
Education**

# Course details - Financial Planning

## BACHELOR OF COMMERCE WITH A MAJOR IN FINANCIAL PLANNING (NQF LEVEL 7, SAQA NO 90509)

### Mode of delivery:

Distance Learning  
Distance Learning Online  
Contact Learning (Melville)

### Year 1

- Induction to Business Studies
- Business Numeracy
- Principles of Microeconomics
- Principles of Accounting
- Introduction to Business Management
- Risk Planning
- Principles of Macroeconomics
- Applied Financial Accounting
- Business Law
- Retirement & Investment Planning

### Year 2

- Intermediate Microeconomics
- Marketing Management Practice
- Legal Aspects of Financial Planning
- Management & Leadership
- Corporate Financial Planning
- Taxation

### Year 3

- Economics 3A
- Business Management 3A
- Advanced Investment Planning
- Retirement Planning
- Estate Planning
- Case Study

### This qualification is suitable for:

- Persons wanting to progress to the Postgraduate Diploma in Financial Planning.
- Persons wanting to apply for the professional designation of Financial Services Advisor™/ FSA™ awarded by the FPI.

## CERTIFICATE IN FINANCIAL PRODUCTS (NQF LEVEL 4, SAQA 62809)

### Mode of delivery:

Distance Learning

- Basic Financial Concepts and Calculations
- Basic Principles of Life Insurance
- Insurance Products
- Legislative Environment
- Skills for the Financial Planner

### This qualification is suitable for:

- Representatives and financial planners starting out in the financial services industry.
- Persons working in the financial services industry who require an NQF level 4 qualification to fulfill their competency requirement for purposes of the FAIS Fit and Proper requirement for Category 1, in sub-categories Long-term Insurance Category A, B1 and B2.

## ADVANCED CERTIFICATE IN FINANCIAL PLANNING (NQF LEVEL 6, SAQA NO 96750)

### Mode of delivery:

Distance Learning

- Legal Aspects of Financial Planning
- Personal Financial Planning for Financial Planners
- Corporate Financial Planning for Financial Planners
- Taxation for Financial Planners
- Practical Application (Case Study) for Financial Planners

### Choose ONE elective from:

Business Management for Financial Planners or Trust Law.

### This qualification is suitable for:

- Persons requiring a full qualification for FAIS Fit and Proper purposes.
- Persons wanting to apply for the designation of Financial Services Advisor™ (FSA™) awarded by the Financial Planning Institute of Southern Africa.

## HIGHER CERTIFICATE IN FINANCIAL PLANNING (NQF LEVEL 5, SAQA NO 96751)

### Mode of delivery:

Distance Learning

- Introduction to Financial Planning Environment
- Financial Planning: Income Tax
- Risk Planning
- Retirement & Investment Planning

### Choose TWO electives from:

Relationship Marketing for Financial Planners, Health Planning, Wills & Admin of Deceased Estates, Retirement Funds, Retirement Funds Administration, Personal Lines Insurance, Basic Principles of Business Financial Planning.

### This qualification is suitable for:

- Persons wanting to apply for the designation of Registered Financial Planner™ (RFP™) awarded by the Financial Planning Institute of Southern Africa.

## HIGHER CERTIFICATE IN FINANCIAL PRODUCTS (NQF LEVEL 5, SAQA NO 97754)

### Mode of delivery:


Distance Learning

- Regulatory Environment
- Long-term Insurance – Environment & Concepts
- Risk Products
- Investment & Savings Products
- Personal Selling Skills

### This qualification is suitable for:

- Representatives advising clients on basic risk and savings products; who require introductory knowledge, cognitive and conceptual tools and practical techniques for their current roles.
- Persons working in the financial services industry requiring a qualification to meet the competency requirements for FAIS Fit and Proper purposes set for Category 1 FSPs within the sub-categories of Long-term insurance Category A, B1 and B2.

# Course details - Financial Planning

	ALIGNMENT WITH FINANCIAL SECTOR CONDUCT AUTHORITY (FSCA) AND THE FINANCIAL PLANNING INSTITUTE OF SOUTHERN AFRICA (FPI)			ALIGNED WITH THE QUALIFICATION REQUIREMENTS FOR THE DESIGNATION OF
	QUALIFICATION	NQF	ON FSCA LIST	
Certificate in Financial Products	4	Yes	-	
Higher Certificate in Financial Products	5	Yes	-	
Higher Certificate in Financial Planning	5	Yes	RFP™	
Advanced Certificate in Financial Planning	6	Yes	FSA™	
Bachelor of Commerce with a major in Financial Planning	7	Yes	FSA™	
Postgraduate Diploma in Financial Planning	8	Yes	CFP®	



## POSTGRADUATE DIPLOMA IN FINANCIAL PLANNING (NQF LEVEL 8, SAQA NO 76943)

### Mode of delivery:

Distance Learning Online

- Induction to Financial Planning
- Financial Planning Environment
- Personal Financial Planning:
  - Risk & Estate Planning
  - Retirement Planning
  - Investment Planning
- Corporate Financial Planning
- Case Study

### This qualification is suitable for:

- Persons who want to become expert financial planning practitioners in order to provide professional financial planning services to a wide range of individual and corporate clients.
- On completion, students will be eligible to apply to the FPI to write the FPI Professional Competency Examination for the CFP® certification.

- **CERTIFICATES IN FINANCIAL PLANNING OR SHORT-TERM INSURANCE**
- **DEGREES WITH FINANCIAL PLANNING OR SHORT-TERM INSURANCE**
- **POSTGRADUATE DIPLOMA IN FINANCIAL PLANNING**
- **CLASS OF BUSINESS TRAINING**
- **REGULATORY EXAMINATIONS**
- **CONTINUOUS PROFESSIONAL DEVELOPMENT**

**Milpark Education. Reframe Your Future.**

Business / College / Commerce /  
**Financial Planning & Insurance** / Investment & Banking

**Any questions?**

086 999 0001

[studentservices@milpark.ac.za](mailto:studentservices@milpark.ac.za)

[www.milpark.ac.za](http://www.milpark.ac.za)