MILPARK EDUCATION

Financial Planning & Insurance

AN EXTRAORDINARY LIFE

PARTNERING WITH YOU ON YOUR FINANCIAL PLANNING & INSURANCE LEARNING JOURNEY

PROUDLY PART OF STADIO HOLDINGS

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, Practice Manager, management position in Financial Planning (eg Sales Manager, Business Development 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 Advisor

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 Advisor

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 require a qualification to be compliant with the FAIS Act, want to start a career in the financial planning or insurance industry, or whether you want to become a professional financial planner or insurance specialist, we offer a qualification to suit your needs.”

- MARILIZE PUTTER, CFP®

COURSE DETAILS
SHORT-TERM INSURANCE

ALIGNMENT WITH THE INSURANCE INSTITUTE OF SOUTH AFRICA (IISA)

QUALIFICATION	NQF	ALIGNED WITH THE QUALIFICATION REQUIREMENTS FOR THE DESIGNATION OF
Bachelor of Commerce with a Major in Short-Term Insurance	7	Fellow (FIISA)
Advanced Certificate in Short-Term Insurance	6	Associate (AIISA)
Higher Certificate in Short-Term Insurance	5	Licentiate (LIISA)

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

MODE OF DELIVERY:
Distance Learning
Distance Learning Online

MODULES:

YEAR 1
- Applied Financial Accounting
- Business Law
- Business Numeracy
- Induction to Business Studies
- Introduction to Business Management
- Legal Framework
- Personal Lines Insurance
- Principles of Accounting
- Principles of Macroeconomics
- Principles of Microeconomics

YEAR 2
- Commercial Lines Insurance
- Intermediate Microeconomics
- Liability Insurance
- Management & Leadership
- Marketing Management Practice
- Short-Term Insurance Environment

YEAR 3
- Advanced Insurance Products
- Case Study
- Commercial Property & Business
- General Management
- International Economics
- Interruption Insurance
- Reinsurance
- Risk Management

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 6, SAQA NO 97779)

MODE OF DELIVERY:
Distance Learning

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

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 5, SAQA NO 83526)

MODE OF DELIVERY:
Distance Learning

COMPULSORY MODULES:
- Commercial Lines Insurance
- Legal Framework
- Personal Lines Insurance
- Risk Management

CHOOSE TWO ELECTIVES FROM:
Marine Insurance, Aviation Insurance, Construction, Engineering, 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

COURSE DETAILS
FINANCIAL PLANNING

ALIGNMENT WITH FINANCIAL SECTOR CONDUCT AUTHORITY (FSCA) AND THE FINANCIAL PLANNING INSTITUTE OF SOUTHERN AFRICA (FPI)

FPI
Financial Planning Institute of Southern Africa
THE PROFESSIONAL STANDARD

QUALIFICATION	NQF	ON FSCA LIST	ALIGNED WITH THE QUALIFICATION REQUIREMENTS FOR THE DESIGNATION OF
Postgraduate Diploma in Financial Planning	8	Yes	CFP®
Bachelor of Commerce with a Major in Financial Planning	7	Yes	FSA™
Advanced Certificate in Financial Planning	6	Yes	FSA™
Higher Certificate in Financial Planning	5	Yes	RFP™
Higher Certificate in Financial Products	5	Yes	-
Certificate in Financial Products	4	Yes	-

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

MODE OF DELIVERY:
Distance Learning Online

COMPULSORY MODULES:
- 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

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

MODE OF DELIVERY:
Distance Learning
Distance Learning Online

MODULES:
YEAR 1
- Applied Financial Accounting
- Business Law
- Business Numeracy
- Induction to Business Studies
- Introduction to Business Management
- Principles of Accounting
- Principles of Macroeconomics
- Principles of Microeconomics
- Retirement & Investment Planning
- Risk Planning

YEAR 2
- Corporate Financial Planning
- Intermediate Microeconomics
- Legal Aspects of Financial Planning
- Management & Leadership
- Marketing Management Practice
- Taxation

YEAR 3
- Advanced Investment Planning
- Case Study
- Estate Planning
- General Management
- International Economics
- Retirement Planning

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 Financial Planning Institute of Southern Africa

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

MODE OF DELIVERY:
Distance Learning

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

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

MODE OF DELIVERY:
Distance Learning

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

CHOOSE TWO ELECTIVES FROM:
Relationship Marketing for Financial Planners, Health Planning, Wills & Administration 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
- Persons requiring a full qualification for FAIS Fit and Proper purposes

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

MODE OF DELIVERY:
Distance Learning

COMPULSORY MODULES:
- Regulatory Environment
- Insurance Environment & Concepts
- Risk Products
- Personal Selling Skills

CHOOSE ONE ELECTIVE FROM:
Investment & Savings Products or Introduction to Personal and Commercial Lines Insurance

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

CERTIFICATE IN FINANCIAL PRODUCTS
(NQF 4, SAQA 62809)

MODE OF DELIVERY:
Distance Learning

COMPULSORY MODULES:
- 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
