

MILPARK  
EDUCATION

Financial Planning  
& Insurance



PROUDLY PART OF  
STADIO  
— HOLDINGS —

PARTNERING WITH YOU ON  
YOUR **FINANCIAL PLANNING &  
INSURANCE** LEARNING JOURNEY

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

**AN EXTRAORDINARY LIFE**

## AN EXTRAORDINARY LIFE

Have you been thinking about furthering your professional qualification? Maybe advancing to the next level in your career? Milpark Education is an educational expert when it comes to helping individuals upskill successfully to take that next step.

For more than two decades, we have helped students like you reach their professional goals. How do we do that?

- By structuring an academic programme to suit you
- By helping you find the right way to move ahead
- Giving you access to the latest, industry-specific expertise.

**MILPARK EDUCATION WANTS TO EMPOWER STUDENTS TO SCHEDULE THEIR STUDIES AROUND THEIR UNIQUE CIRCUMSTANCES. WE OFFER HIGH QUALITY AND ACCESSIBLE DISTANCE AND ONLINE LEARNING SOLUTIONS. FOR CORPORATES, THERE IS THE POSSIBILITY OF ARRANGING CONTACT COURSES.**

## ABOUT MILPARK

Milpark Education was one of the first private providers of higher management education in South Africa. Since 1997, it has evolved into an internationally recognised institution. The Milpark Business School is currently home to the only internationally (AMBA) accredited MBA in Africa for online distance learning.

Milpark's mission is to equip students with the knowledge and skills to lead and excel in a changed world. We believe in offering students a learning pathway from adult matric to doctorate level. We currently offer 21 accredited higher education programmes through five schools: the Business School; the School of Commerce; the School of Financial Planning and Insurance, the School of Banking and Investment, and Milpark College. In 2019, Milpark acquired the CA Connect business, which is the only online educational provider offering a Postgraduate Diploma in Accounting.

Our programmes are offered through online and distance learning in our support centres situated in Johannesburg and in Cape Town.

"We partner with you for an educational journey that suits your lifestyle"



## ABOUT STADIO

Milpark is proudly part of STADIO Holdings, an investment company in private higher education, dedicated to widening the access to higher education learning opportunities in South Africa.

# MESSAGE FROM THE HEAD OF THE SCHOOL

## WELCOME TO THE SCHOOL OF FINANCIAL PLANNING AND INSURANCE!

We provide students with a complete qualification path in financial planning and insurance. We want to journey with you as you achieve your 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 graduates 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 want to become a professional financial planner or insurance specialist - we offer a qualification to suit your needs.

Let Milpark Education help you take the next step in your Extraordinary Life.

Warm regards,

*Pietro Odendaal*

“We are constantly looking for better ways to provide suitable support to the student-on-the-run.”

# QUALIFICATIONS & CAREER PATHS

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# SHORT-TERM INSURANCE

Our short-term insurance qualifications are aligned with the Insurance Institute of South Africa (IISA)



## HIGHER CERTIFICATE IN SHORT-TERM INSURANCE

NQF LEVEL 5 - SAQA No: 83526

The Higher Certificate in Short-term Insurance provides students with the required knowledge to navigate within the South African regulatory environment as a short-term insurance specialist within the areas of personal and commercial lines insurance.

### MINIMUM DURATION

1 year

### MODE OF DELIVERY

Distance Learning

### CAREER OPPORTUNITIES

The Higher Certificate in Short-term Insurance is suitable for people wanting to enter the short-term insurance industry, people requiring a recognised qualification for the purpose of the FAIS Act, and people wanting to apply for the designation of Licentiate (LIISA) awarded by the Insurance Institute of South Africa (IISA).

Typical career opportunities include: Insurance broker, claims & underwriting administrator, services representative, insurance sales consultant.

## ADVANCED CERTIFICATE IN SHORT-TERM INSURANCE

NQF LEVEL 6 - SAQA No: 97779

The Advanced Certificate in Short-term Insurance is ideal for career-orientated individuals within the short-term insurance industry who want to complete a qualification that provides an in-depth understanding of insurance practices in terms of technical subject matter and application skills.

### MINIMUM DURATION

1 year

### MODE OF DELIVERY

Distance Learning

### CAREER OPPORTUNITIES

This qualification is suitable for people wanting to specialise in the short-term insurance industry and people wanting to apply for the designation of Associate (AIISA) awarded by the Insurance Institute of South Africa (IISA).

Typical career opportunities include: Insurance broker, claims & underwriting specialist, insurance officer.

## BACHELOR OF COMMERCE WITH A MAJOR IN SHORT-TERM INSURANCE

NQF LEVEL 7 – SAQA No: 90509

The Bachelor of Commerce with a major in Short-term Insurance provides a strong foundation in general business principles and the required accounting, marketing, economic and quantitative skills. This qualification meets the educational requirements of the designation of Fellow (FIISA) awarded by the Insurance Institute of South Africa (IISA).

### MINIMUM DURATION

3 years

### MODES OF DELIVERY

Distance Learning

Distance Learning Online

### CAREER OPPORTUNITIES

Graduate trainee in short-term insurance, specialist or management position in short-term insurance including risk manager, underwriting manager, sales manager.



# FINANCIAL PLANNING

Our financial planning qualifications are aligned with the Financial Sector Conduct Authority (FSCA) and the Financial Planning Institute of Southern Africa (FPI).



## HIGHER CERTIFICATE IN FINANCIAL PLANNING

NQF LEVEL 5 – SAQA No: 96751

The Higher Certificate in Financial Planning equips students with the knowledge and skills they need to operate ethically and responsibly as financial advisors, and to be able to respond to the challenges of the economic environment and the changing nature of the financial services industry.

### MINIMUM DURATION

1 year

### MODE OF DELIVERY

Distance Learning

### CAREER OPPORTUNITIES

The Higher Certificate in Financial Planning is suitable for people who want to apply for the designation of Registered Financial Planner™ (RFP™) awarded by the Financial Planning Institute of Southern Africa, and people requiring a recognised qualification for FAIS fit and proper purposes.

Typical career opportunities include: Registered Financial Planner™, financial planning administrator, client relationship consultant, wealth management administrator, financial advisor.

## HIGHER CERTIFICATE IN FINANCIAL PRODUCTS

NQF LEVEL 5 – SAQA No: 97754

The purpose of this industry-oriented qualification is to provide “representatives” (as defined in the Financial Advisory and Intermediary Services Act (FAIS Act)) who advise clients on basic risk and savings products with introductory knowledge and practical techniques for their current roles. The qualification is primarily aimed at representatives who work in Long-term Insurance and/or Short-term Insurance, and who require knowledge on the relevant legislation, products as well as personal selling skills in order to be successful representatives.

### MINIMUM DURATION

1 year

### MODE OF DELIVERY

Distance Learning

### CAREER OPPORTUNITIES

The Higher Certificate in Financial Products qualification is aimed at financial advisors who provide financial services to individual clients using Long-term Category A, B1 and B2 type products to address clients’ needs.

The qualification will equip students with the required knowledge and skill to provide sound advice to clients on products outlined in Long-term Insurance subcategories A, B1-A, B2-A and Short-term Insurance Personal Lines A1 of BN 194 of 2017. The knowledge emphasises general principles applicable to long-term insurance and short-term insurance, and the application of these principles in the financial services industry.

## ADVANCED CERTIFICATE IN FINANCIAL PLANNING

NQF LEVEL 6 – SAQA No: 96750

The qualification equips students with the knowledge and skills required by expert practitioners in the financial planning sector and prepares them for further studies. The Milpark Advanced Certificate in Financial Planning addresses the academic qualification requirements for the designation of Financial Service Advisor™ (FSA™) professional awarded by the Financial Planning Institute of Southern Africa.

### MINIMUM DURATION

1 year

### MODE OF DELIVERY

Distance Learning

### CAREER OPPORTUNITIES

Typical career opportunities include: Financial Services Advisor™, para-planner, financial advisor.



## BACHELOR OF COMMERCE WITH A MAJOR IN FINANCIAL PLANNING

NQF Level 7 – SAQA No: 90509

The Bachelor of Commerce with a major in Financial Planning provides a solid basis in the field of commerce and will equip students with the knowledge and skills required to operate responsibly and successfully as financial planning practitioners.

This qualification is suitable for people who want to progress to the Postgraduate Diploma in Financial Planning and those who want to apply for the professional designation of Financial Services Advisor™ (FSA™) awarded by the Financial Planning Institute of Southern Africa.

### MINIMUM DURATION

3 years

### MODES OF DELIVERY

Distance Learning

Distance Learning Online

### CAREER OPPORTUNITIES

Typical career opportunities include: Financial Services Advisor™, wealth management assistant, graduate trainee in financial planning, para-planner, practice manager, management position in financial planning (e.g. sales manager, business development manager).

## POSTGRADUATE DIPLOMA IN FINANCIAL PLANNING

NQF LEVEL 8 – SAQA No 76943

The Postgraduate Diploma equips students with the expert knowledge and professional skills required by practitioners in the financial planning sector. Financial planners who want to become Certified Financial Planner® Professionals can use this qualification to satisfy the educational requirements set by the FPI.

This qualification is suitable for people 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.

### MINIMUM DURATION

18 months

### MODE OF DELIVERY

Distance Learning Online

### CAREER OPPORTUNITIES

On completion, students will be eligible to apply to the FPI to write the FPI Professional Competency Examination for the CFP® designation.

Typical career opportunities include: Certified Financial Planner® professional, professional wealth manager, professional financial planner, entrepreneur.



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# HOW TO GET IN TOUCH WITH US

If you have any questions or enquiries about our programmes or how to apply, please contact us using the details below:



086 999 0001



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



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