



CONTINUOUS PROFESSIONAL DEVELOPMENT (CPD)

Online Short Course



Recognised



Recognised

Mode of Delivery:
Distance Learning Online

**Milpark Education
Become More.**

1 Description

The competency requirements, as set out in the **Financial Advisory and Intermediary Services Act, 2002** (Act No. 37 of 2002) [FAIS Act (BN 194 of 2017)], require **financial services** providers, key **individuals and representatives** to complete continuous professional development (CPD).

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The following topics are covered:

1

accredited and tracked by a Professional Body;

2

allocated an hour-value by that **Professional Body**; and

3

verifiable, and **excludes**

- an **activity performed** towards a qualification; and
- **product-specific** training.



Financial Planning courses

Online Short Course: Administration of Deceased Estates (CPD)	ADME1-OS	6 hours
Online Short Course: Consequences of Non-Disclosure (CPD)	CONND1-OS	1 hour
Online Short Course: Constructing a Client Portfolio (CPD)	CCPOR1-OS	2 hours
Online Short Course: Cultural Diversity in Financial Planning (CPD)	CDFPL1-OS	2 hours
Online Short Course: Disability Cover (CPD)	DISCO1-OS	1 hour
Online Short Course: Employee Benefits and Client Engagements (CPD)	EBCEN1-OS	1 hour
Online Short Course: Employee Benefits: Risk and Structuring of Risk Benefits (CPD)	EMBEN1-OS	1 hour
Online Short Course: Ethical Investments (CPD)	EINVE1-OS	2 hours
Online Short Course: Ethics Cases for Financial Planners (CPD)	ECAFP1-OS	2 hours
Online Short Course: FICA Annual Update (CPD)	FICAU1-OS	5 hours
Online Short Course: Forex Investments (CPD)	FINV2C-OS	5 hours
Online Short Course: Fraud Detection and Prevention (CPD)	FDPREV-OS	5 hours
Online Short Course: Global Investment Strategies (CPD)	GISTR1-OS	1 hour
Online Short Course: Health Services Benefits (CPD)	HBEN2C-OS	6 hours
*Online Short Course: Investment Planning (CPD)	INPLA1-OS	6 hours
Online Short Course: Investments (CPD)	IVES2C-OS	9 hours
Online Short Course: Long-term Insurance (CPD)	LINS2C-OS	11 hours
Online Short Course: Pension Fund Benefits (CPD)	PBEN2C-OS	6 hours
Online Short Course: Practice Management (CPD)	PMANA1-OS	5 hours
Online Short Course: Regulatory Requirements for Replacements (CPD)	RRREP1-OS	2 hours
Online Short Course: Risk and Business Assurance (CPD)	RBIN1-OS	5 hours
Online Short Course: Short-term and Long-term Deposits (CPD)	STLD2C-OS	7 hours

Financial Planning courses cont...

Online Short Course: Short-term Commercial Lines (CPD)	STCO2C-OS	14 hours
Online Short Course: Short-term Personal Lines (CPD)	STPE2C-OS	10 hours
*Online Short Course: Social Media Use (CPD)	SMEDU1-OS	5 hours
*Online Short Course: Social Media Use for Financial Planners (CPD)	SMUFP1-OS	3 hours
*Online Short Course: Social Media Use for Key Individuals (CPD)	SMUKI1-OS	2 hours
Online Short Course: Structured Deposits (CPD)	SDEP2C-OS	5 hours
Online Short Course: Tax and Retirement Funds (CPD)	TACRF1-OS	4 hours
Online Short Course: Tax-free Savings Accounts in Financial Planning (CPD)	TSAFP1-OS	1 hour
Online Short Course: The POPI Act (CPD)	PAPAC1-OS	1 hour

* Depicts courses that have an 80% pass mark.

Short-term Insurance courses

Online Short Course: Cost of Customer Care in Short-term Insurance (CPD)	CCCSTI-OS	2 hours
Online Short Course: Short-term Insurance (CPD)	STINS1-OS	7 hours
Online Short Course: Fundamentals of Business Interruption Insurance (CPD)	FBIINS1-OS	2 hours
Online Short Course: Parametric Insurance (CPD)	PARAI1-OS	2 hours
Online Short Course: Introduction to Fire Insurance Classes	IFICL1-OS	2 hours
Online Short Course: Introduction to Transportation Insurance	ITRAI1-OS	2 hours
Online Short Course: Introduction to Engineering Insurance	IENGI1-OS	2 hours
Online Short Course: Introduction to Liability Insurance	ILIAI1-OS	2 hours
Online Short Course: Introduction to Motor Insurance	IMINS1-OS	2 hours
Online Short Course: Introduction to Aviation Insurance	IAVII1-OS	2 hours
Online Short Course: Introduction to Marine Insurance	IMARI1-OS	2 hours
Online Short Course: Accident & Health Insurance	ACCHI1-OS	2 hours
Online Short Course: Drone Insurance	DROIN1-OS	2 hours

Short-term Insurance courses cont...

Online Short Course: Personal Motor Insurance	PEMIN1-OS	2 hours
Online Short Course: Call Centre Training	CACET1-OS	2 hours
*Online Short Course: Advanced Business Interruption	ABUIN1-OS	8 hours

** This course is available as a four-week short course for corporates on request, with a minimum of 25 students.*

Banking and Investment short courses

Online Short Course: The Future of Banking (CPD)	FUTBAN-OS	6 hours
Online Short Course: How Banks Generate Income (CPD)	BGENIN-OS	7 hours
Online Short Course: Regulation in Banking (CPD)	REGUBA-OS	6 hours

List of Class of Business training content offered for the purposes of meeting the CPD requirements of the FAIS Act.

Note that no CPD points will be allocated for courses completed for the sole purpose of meeting the competence requirement of Class of Business training.

Online Short Course: Forex Investments	FORIN1-OS
Online Short Course: Health Services Benefits	HSBEN1-OS
Online Short Course: Investments	INVES1-OS
Online Short Course: Long-term Insurance	LTINS1-OS
Online Short Course: Pension Fund Benefits	PFBEN1-OS
Online Short Course: Short-term and Long-term Deposits	STLTD1-OS
Online Short Course: Short-term: Commercial Lines	STICL1-OS
Online Short Course: Short-term: Personal Lines	STIPL1-OS
Online Short Course: Structured Deposits	STDEP1-OS

3

Module Descriptions

The purpose of this course is to provide a **clear explanation of the various products available** under the Accident and Health Insurance class of business. This course is aimed at providing participants with an understanding of the types of **Accident and Health Insurance** available in South Africa.

**Accident
and Health
Insurance
ACCHI1-OS**

**Advanced
Business
Interruption
ABUIN1-OS**

The purpose of this module is to equip students with the knowledge required to advise commercial and **corporate clients** regarding their advanced **Business Interruption** needs. We will take a comprehensive look at the terminology, policy wordings, extensions and various types of risks. In-depth needs analysis and **calculations will also be addressed.**

The purpose of this short course is to **provide an overview of the deceased estate administration** process. The course also considers the parties relevant to the administration process, key aspects of the **legislative landscape** in which the process takes place, and the role that the financial adviser can play when a deceased estate is administered. The course is aimed at providing a **foundational knowledge** of the deceased estate administration process to **financial planning students as well as professional advisers.**

**Administration
of Deceased
Estates
ADMDE1-OS**

**Call Centre
Training
CACET1-OS**

The **purpose of this course is to provide** an overview of effective sales and communication skills to call centre agents. The course is aimed at providing participants with an **overview of the sales function**, selling techniques and communication skills.

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The **purpose of this course is to provide knowledge** on the main pieces of legislation that regulate the disclosure requirements for **financial services providers (FSP)**, its representatives and product providers of financial products. It provides an overview of what should be disclosed by the FSP, representative and product providers to a client. **Non-adherence can result in penalties**, and consequences thereof are not only reputational, but costly. **This module enables** you to know what to disclose to your client and what the product provider should disclose.

**Consequences
of Non-
Disclosure
CONND1-OS**

**Constructing a
Client Portfolio
CCPOR1-OS**

The **purpose of this short course is to assist students** in their understanding of how to construct an investment portfolio for their clients. This is to enable the student to understand the portfolio construction process that has to be followed. The **theory and approach are supported by practical examples**, as well as extra reading and activities. This is intended only as a short course to discuss some of the available approaches in constructing a client's portfolio, and to review relevant terms. This course is **not intended to cover comprehensively** all the available approaches with the associated benefits and advantages of each, and this should not be expected.

The **purpose of this course is to introduce participants** to the relevant concepts and considerations in providing good customer care to clients. There are factors that **differentiate good and bad customer care**, and the effect on the company. In order to ensure great customer care, various effective guidelines are included, that will **provide the delegate with techniques to identify** the type of client with which they are dealing, and tools to be able to effectively improve client interaction.

**Cost of Customer
Care in Short-
term Insurance
CCCSTI-OS**

**Cultural
Diversity in
Financial
Planning
CDFPL1-OS**

This **module is aimed at providing students with an understanding of the various theories** and thoughts associated with culture, and its diverse nature. Cultural diversity within financial planning stretches far beyond the issue of colour, race or social standing, and is in fact multi-faceted. In order to **develop niche markets and comprehend different value systems**, financial planners need to understand South African culture, as well as different generations and how their value systems differ. The **financial planner** will begin to appreciate the importance of embracing an ever-evolving culture, steeped in different levels of diversity. **How to simply 'talk'** about diversity and to address it within a more inclusive financial planning environment is the true meaning of cultural intelligence (CQ).

The **purpose of this short course** is to serve as a refresher for **entry-level advisers** who meet with potentially new or existing clients to discuss and help them reach their financial goals. As per the **Financial Advisory and Intermediary Services Act, 2002 (Act No. 37 of 2002) (FAIS)**, all registered **Financial Advisers** have both a fiduciary and suitability obligation to put their clients' interests first when suggesting financial products. The **course provides an understanding of the different types** of disability cover in terms of features, advantages and general characteristics that will enable **Financial Advisers** to offer financial products that best meet the suitability and affordability requirement needs of their potentially new or existing clients.

Disability Cover DISCO1-OS

Drone Insurance DROIN1-OS

The **purpose of this course is to provide** an overview of the various types of Drone Insurance cover available across the globe. This course is **aimed at providing participants** with an understanding of the cover available for drones in the insurance market.

The purpose of this course is to introduce the **basic employee benefits** available. We also introduce **basic principles and steps to follow** in the client engagement process.

Employee Benefits and Client Engagements EBCEN1-OS

Employee Benefits: Risk and Structuring of Risk Benefits EMBEN1-OS

This **course outlines the key concepts** of employee risk benefits. The **purpose of this course** is to introduce employee benefit risk types, as well as how they are structured, the **contributions involved**, the benefits payable and the terms and conditions.

The purpose of this course is to introduce participants to the relevant concepts and considerations in ethical investments. The **role of the institutional investor and the codes** guiding ethical investment behaviour will be considered. As a financial planner, the **participant will be challenged to be mindful** of ethical investment choices when considering investment options for clients.

Ethical Investments EINVE1-OS

The purpose of this short course is to investigate ethical considerations for financial planners. **Topic 1 begins by taking a closer look** at the relevant definitions. We then continue by looking at different examples of **codes of ethics in the financial planning industry**; and we notice that a golden thread seems to follow throughout the various identified principles, one that is closely related to the **Financial Advisory and Intermediary Services' (FAIS's) General Code of Conduct (GCOC)**. This course also considers determinations from the Office of the Ombud for Financial Services Providers (FAIS Ombud) that highlight a deviance from both the GCOC and Treating Customers Fairly (TCF) principles.

**Ethics Cases
for Financial
Planners
ECAFP1-OS**

**FICA: Annual
update
FICAU1-OS**

In this short course, you will learn how to **comply with the requirements of the Financial Intelligence Centre Act, 2001 (Act No. 38 of 2001)** (also referred to as 'FICA' or the 'FIC Act') and other relevant anti-money laundering legislation as they apply to accountable institutions (AIs), like financial services providers (FSPs). **This course is an update on FICA:** it outlines the new amendments and provides an overview of the application of these FICA amendments. We will also identify the appropriate procedures and systems that a provider must have in place in order to adhere to the Risk Management and Compliance Programme (RMCP). **Note that accountable institutions (AIs)** have to maintain specified records for a minimum period of five years and that these documents must be used for customer due diligence identification and verification. In addition, this module provides an **outline of the consequences of non-compliance and offences** that face an accountable institution if they do not adhere to FICA. To conclude, a brief exposition on the requirements to include in your RMCP, as per the published Guidance Note 7 on FICA, will be discussed as well.

The purpose of this course is to provide participants with the knowledge required to **successfully complete the Class of Business** training on forex. **Class of Business training** is one of the competency requirements introduced by Board Notice 194 of 2017 [Financial Advisory and Intermediary Services Act, 2002 (Act No. 37 of 2002) (FAIS Act)]. Financial services providers (FSPs), **key individuals and representatives are required** to be trained and assessed on the product lines (classes of business) in which they intend to render financial services.

**Forex
Investments
FINV2C-OS**

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The **purpose of this short course is to provide you with an understanding of fraud management**. The module is structured into three topics, which include understanding the nature of fraud, the reasons behind why perpetrators commit fraud, red flag indicators, as well as fraud measures and techniques to detect and prevent fraud. **The module will assist you in applying the theory** to everyday life situations, thereby preventing you from falling victim to fraudulent schemes. It will further assist you in identifying and combatting fraudulent activities in the organisation where you are employed.

**Fraud
Detection and
Prevention
FDPREV-OS**

**Fundamentals
of Business
Interruption
Insurance
FBIINS1-OS**

The purpose of **Fundamentals of Business Interruption Insurance** is to demystify difficult and problematic terms and definitions used in Business Interruption Insurance. The **goal is to make advisers more at ease discussing the topic** with their clients, to give more accurate advice to eliminate errors and ensure clients are adequately covered. **The course will cover topics such as** the differences between Gross Profit Additions & Difference basis, Increases in Costs of Working and Additional Increase in Costs of Working, Standard & Annual Turnover as well as setting the correct Indemnity Period.

The **purpose of this course is to provide** an overview of the benefits and risks of including offshore assets in an **investment portfolio** and how clients can gain access to offshore investment opportunities.

**Global
Investment
Strategies
GISTR1-OS**

**Health Services
Benefits
HBEN2C-OS**

The purpose of this course is to equip the **financial planner with the theory background of** a medical scheme, as well as the alternative benefits that may be available. In this course, financial planners are enabled to understand the requirements for the **provision of planning for health** events using medical schemes, as well as alternative funding opportunities.

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The purpose of this short course is to provide you with an understanding of how **banks generate income**. The module will assist you in understanding the income sources of a bank. The **module is structured into two topics**; namely, 'Pricing of bank products' and 'Interest and investment income'.

**How Banks
Generate
Income
BGENIN-OS**

**Introduction
to Aviation
Insurance
IAVII1-OS**

The purpose of this course is to provide a clear explanation of the cover **provided by the Aviation Insurance policy**. This course is aimed at providing participants with an **understanding of insurance evolution** and law, coverage and policy forms, different types of products, specialist and ancillary classes, underwriting and claims practices of Aviation Insurance.

The **purpose of this course is to provide** a clear explanation of the cover for Plant, Machinery and Electronics provided by the Engineering policy. This course is **aimed at providing participants with an understanding** of the scope of cover, policy conditions, exceptions, clauses and extensions of Engineering Insurance.

**Introduction
to Engineering
Insurance
IENGI1-OS**

**Introduction to
Fire Insurance
Classes
IFICL1-OS**

The purpose of this course is to provide a clear **explanation of the cover provided by** the Fire, Buildings Combined and Office Contents sections of a Commercial Multi-peril policy. This course is **aimed at providing participants with an understanding** of the defined events, structure, conditions and exclusions of the Fire Insurance Classes.

The purpose of this course is to **provide a clear explanation** of the cover provided by the **Liability Insurance policy**. This course is aimed at providing participants with an **understanding of the defined** events, basis of cover, conditions, extensions and exclusions of the Liability Insurance policy.

**Introduction
to Liability
Insurance
ILIAI1-OS**

**Introduction
to Marine
Insurance
IMARI1-OS**

The purpose of this course is to provide an **introductory explanation of the cover provided by Marine insurance**. This course is aimed at providing participants with an understanding of the cover provided in the Marine insurance market.

The purpose of this course is to provide a clear explanation of the cover provided under the Motor policy. This course is **aimed at providing participants with an understanding of** the defined events, structure, conditions, exceptions, extensions and exclusions of Motor Insurance.

**Introduction to
Motor Insurance
IMINS1-OS**

The purpose of this course is to provide a clear explanation of the cover provided by the **Transportation Insurance** policy. This course is aimed at providing participants with an understanding of the structure, conditions and extensions of the Transportation Insurance policy.

**Introduction to
Transportation
Insurance
ITRA11-OS**

**Investment
Planning
INPLA1-OS**

Investment planning as a component of **financial planning covers a wide area**. It includes, among others, investment instruments, investment vehicles, investment processes, taxation and implementation options. Given that many of the **more basic and theoretical aspects** are covered within the financial planning education environment, this course will focus on three more advanced topics. **Firstly**, it explores the very important issue of the value of financial and investment advice, and whether this value can be quantified or measured. **Secondly**, it explores the discussions around risk within the **investment environment**: what it means and whether traditional risk-profiling questionnaires have a place within the investment planning process. **Lastly**, the course looks at the discretionary fund manager and what his role is within the investment planning process. The purpose of this course is therefore to **encourage critical thinking and introspection from an individual planner and/or financial services provider's 'business perspective'** in respect of these important issues.

The purpose of this course is to **provide candidates with the knowledge required to successfully complete** the class of business training on long-term insurance. Class of business training is one of the competency requirements introduced by BN194 of 2017 [Financial Advisory and Intermediary Services Act, 2002 (Act No. 37 of 2002) (FAIS Act)], and financial services providers, **key individuals and representatives** are required to be trained and assessed on the product lines (classes of business) in which they intend to render financial services.

**Long-term
Insurance
LINS2C-OS**

**Parametric
Insurance
PARAI1-OS**

The purpose of this course is to provide a clear explanation of the cover provided by Parametric Insurance. This course is **aimed at providing participants with an understanding** of the structure, conditions and claims process of Parametric Insurance.

The purpose of this course is to provide candidates with the knowledge required to successfully complete the Class of Business training on pension fund benefits. Class of Business training is **one of the competency requirements** introduced by BN194 of 2017 (published in Government Gazette 41321, dated 15 December 2017), and **financial services providers**, key individuals and representatives are required to be trained and assessed on the product lines (classes of business) in which they **intend to render financial services**.

**Pension Fund
Benefits
PBEN2C-OS**

**Personal Motor
Insurance
PEMIN1-OS**

The purpose of this course is to **provide an in-depth look into** the cover, extensions, exclusions and conditions for the cover provided under the Personal Motor Section of a Personal Lines Insurance Policy.

The purpose of this online short course is to consider **certain elements of practice management**. An article by Frances X. Frei on “**The Four Things a Service Business Must Get Right**” serves as a starting point for this course. The value proposition of the financial planner and/financial planning practice will then be considered in more detail. Next, certain elements of pricing and costing will be reviewed. The **final two topics of this course** will provide an introduction to employee and customer management.

**Practice
Management
PMANA1-OS**

**Regulation
in Banking
REGUBA-OS**

The purpose of this short course is to provide you with an **understanding of compliance, risk management and the regulatory** environment in the banking sector. The module will assist you in understanding how regulatory compliance is managed within the banking sector, and how relevant risk and compliance methodologies are applied. **The module is structured into two topics;** namely, ‘Regulatory Risk Management’ and ‘The Regulatory Environment’.

The purpose of this course is to **assist students in their understanding of the risks that companies face** and how business assurance solutions can be implemented to mitigate or solve these risks. This will **further enable students** to understand the different risks that business owners, shareholders and partners face, which threaten the continuity of their business should an unplanned death or disability occur. This **course also focuses on the importance** of key employees in the business and how, through proper business risk planning, this can be implemented to prevent businesses from closing down. The theory and approach are supported with practical examples as well as extra reading and activities for students.

**Risk and
Business
Assurance
RBIN1-OS**

The **purpose of this short course is to provide you with an understanding of fraud management.** The module is structured into three topics, which include understanding the nature of fraud, the reasons behind why perpetrators commit fraud, red flag indicators, as well as fraud measures and techniques to detect and prevent fraud. **The module will assist you in applying the theory** to everyday life situations, thereby preventing you from falling victim to fraudulent schemes. It will further assist you in identifying and combatting fraudulent activities in the organisation where you are employed.

**Fraud
Detection and
Prevention
FDPREV-OS**

**Fundamentals
of Business
Interruption
Insurance
FBIINS1-OS**

The purpose of **Fundamentals of Business Interruption Insurance** is to demystify difficult and problematic terms and definitions used in Business Interruption Insurance. The **goal is to make advisers more at ease discussing the topic** with their clients, to give more accurate advice to eliminate errors and ensure clients are adequately covered. **The course will cover topics such as** the differences between Gross Profit Additions & Difference basis, Increases in Costs of Working and Additional Increase in Costs of Working, Standard & Annual Turnover as well as setting the correct Indemnity Period.

The purpose of this course is to **provide candidates with the knowledge required to successfully complete** the class of business training on short-term and long-term deposits. Class of business training is one of the **competency requirements introduced by** Board Notice 194 of 2017 (Financial Advisory and Intermediary Services Act, 2002 (Act No. 37 of 2002)) (the FAIS Act). Financial services providers, **key individuals** and representatives are required to be trained and assessed on the product lines (classes of business) in which they **intend to render financial services.**

**Short-term
and Long-
term Deposits
STLD2C-OS**

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The purpose of this course is to provide candidates with the knowledge required to **successfully complete** the **class of business training on commercial lines insurance**. Class of business training is one of the competency requirements introduced by BN194 of 2017 [Financial Advisory and Intermediary Services Act, 2002 (Act No. 37 of 2002) (FAIS Act)], and financial services providers, key individuals and representatives are **required to be trained and assessed** on the product lines (classes of business) in which they intend to render financial services.

**Short-term
Commercial
Lines
STCO2C-OS**

**Short-term
Insurance
Personal Lines
STPE2C-OS**

The purpose of this course is to provide candidates with the knowledge required to successfully complete the class of business training on **Personal Lines insurance**. Class of business training is one of the competency requirements introduced by BN 194 of 2017 [Financial Advisory and Intermediary Services Act, 2002 (Act No. 37 of 2002) (FAIS Act)], and **financial services providers**, key individuals and **representatives are required** to be trained and assessed on the product lines (classes of business) in which they intend to render financial services.

The purpose of this course is to provide candidates with the knowledge required to successfully complete the class of **business training on structured deposits**. Class of business training is one of the competency requirements introduced by BN 194 of 2017 [Financial Advisory and Intermediary Services Act, 2002 (Act No. 37 of 2002) (FAIS Act)]. Financial services providers, key individuals and representatives are **required to be trained and assessed** on the product lines (classes of business) in which they intend to render **financial services**.

**Structured
Deposits
SDEP2C-OS**

**Short-term
Insurance
STINS1-OS**

The purpose of this short course is to provide an overview of the knowledge and **skills required by personal lines insurance specialists** operating within the South African insurance environment. This course is **aimed at providing participants with an understanding** of the general principles underlying personal lines insurance and the nature and structure of the different personal lines products. **Trends in personal lines insurance** will also be considered.

This short course provides an overview of **important considerations for managers/owners of financial planning practices** on the use of social media. The course introduces the relevant legislation one should consider when using social media in a financial planning practice, and includes the use of social media by employees. The **course further provides an introduction on how to use social media** more effectively in the marketing of a financial planning practice or business. Finally, policies on the use of social media in the **financial planning** practice are considered to encourage the manager/business owner to consider this as part of the risk management and human resources policies in their business.

**Social Media
Use
SMEDU1-OS**

**Social Media
Use for Key
Individuals
SMUK11-OS**

This course provides an **introduction to the use of social media in financial services**. The course further introduces the relevant legislation one should consider when **using social media in financial services**. Social media policies and why key individuals should be aware of **these policies are also discussed**.

This **course provides an introduction to the use of social media** in financial services. The course further introduces the **relevant legislation** one should consider when using social media in financial services.

**Social Media
Use for
Financial
Planners
SMUFP1-OS**

**Tax and
Retirement
Funds
TACRF1-OS**

The purpose of this short course is to **enable financial planners to understand the taxation of retirement funds at three important points**: tax involved when a **client makes contributions** to a retirement fund; the tax on returns within the retirement fund while the client is a member; and the tax implications when the client exits the fund (whether on account of retirement, withdrawal or death). **Understanding the tax implications of each** allows financial planners to provide appropriate retirement planning recommendations to clients.

The purpose of this course is to serve as a refresher of the theory background as it relates to **tax-free savings accounts**. With this basis in place, it aims to engage financial planners to consider certain advice aspects – **with reference also to their own advice processes**.

**Tax-free
Savings
Accounts
in Financial
Planning
TSAFP1-OS**

**The Future
of Banking
FUTBAN-OS**

The purpose of this **short course is to provide you with an understanding of the future of banking**. The module is structured into six topics, which include discussing **opportunities and challenges for the future of banking**, evaluating how the **role of the typical banker** will change, as well as explaining possible steps that a banker can take to prepare for the future of banking. **The module will assist you in being prepared** for what the future of banking entails and being **future-fit** in a constantly changing banking environment.

The purpose of this course is to **provide a clear explanation of the Protection of Personal Information Act (POPI Act) as updated in July 2020**. This course is aimed at **providing participants** with an understanding of the compliance and non-compliance of the POPI Act.

**The POPI Act
PAPAC1-OS**

**The Regulatory
Requirements
for
Replacements
RRREP1-OS**

The purpose of this course is to understand the **main pieces of legislation that regulate** the replacement of financial products and associations to which the **Financial Services Provider** and its representatives have to adhere.

The outcomes for **all the courses listed above**, can be found on our website

[Learn More](#)



4

Offering

The following will be provided for each course:



Access to the online course page



Online material



Videos from industry experts (where applicable) to guide you through complex aspects of the material



Online activities to **complete before attempting** the assessments



Three attempts at each **online assessment**



Online verifiable certificate (available within 24 to 48 hours) on successful completion of course

5

Mode Of Delivery

The course will be delivered using the *myMilpark* online platform. You will study in your own time. A tutor will be **available on an online forum** to assist with content-related queries.

A **course administrator** will also be available to assist with administrative queries and may be **contacted through telephone or email**.



6

Expectations

In order to successfully complete this course, you should:



work through **all the material and activities**



achieve at least the pass mark in each of the online tests assigned to a specific **course within the time allowed.**

You are allowed three attempts at each online test. If you do not achieve a **pass mark in any of the three attempts**, you will be required to repeat the course.

If you **do not achieve the relevant pass mark** in each of the online tests on your third attempt, you will be required to register to **repeat the course at the repeat fee**. You will only be required to redo the online tests where you did not achieve the required **minimum pass percentage** (if you register before your qualification expires). If you **have to redo certain tests and register for these after** your course has expired, then you will have to repeat all the tests – even the ones you already passed.

When you register for the repeat, you will be granted an **additional three (3)** attempts for the relevant tests.

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7

Admission Requirements

These courses have **open enrolment**, but proficiency in English is required.

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.

8

Duration

The course is self-paced, and the duration will **depend on your time availability up to a maximum of 12 months**. If you **do not complete all your assessments within the 12-month** period, you will be **required to reapply for admission** onto the course and repeat **ALL** the tests (even those you passed).

9

Certification

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

On **completion of the course**, you will be **awarded CPD points** as accredited by the FPI (Financial Planning Institute of Southern Africa) or the IISA (Insurance Institute of South Africa), a Professional Body as defined in BN194 of 2017.

Students who owe the institution money will **not receive any correspondence** with regard to completion of their short course; nor will they be issued a certificate until the account has been paid in full.



Through the *myMilpark* and *myCourses* **online tuition** and support environments, students have **access to all course materials** (including formative and summative assessments), discussion opportunities, administrative **services and a wealth of external resources**.

Minimum requirements to study online and complete assessments and online proctored assessments

A **laptop or personal computer** (PC) with one of the **following operating systems**:



Windows 10+



macOS 10.11+



Ubuntu 18.04+



Chrome 58+



Continuous (daily) access to a **stable internet connection** with an upload and download speed of at least 5 Mbps.



A **camera/webcam** (720p resolution)



Speakers and a microphone **OR** headphones



2GB free **RAM** (memory)



250MB **free disk space**.

[View Technical Requirements](#)

[How To Check Your RAM](#)

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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.

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Pricing

The **course fees include access** to the online environment for the **full duration** of the course (maximum of one year from date of registration), and one cycle of assessments (three attempts at each online test).



Each continuous professional development module is priced as follows:

Duration	Pricing
1 hour	R230
2 hours	R340
3 hours	R500
4 hours	R620
5 hours	R780
6 hours	R930
7 hours	R1 020
8 hours	R1 170
9 hours	R1 320
10 hours	R1 470
11 hours	R1 610

Duration
12 hours
14 hours
15 hours

Pricing
R1 750
R2 040
R2 190

Should you wish to complete the **Class of Business Training** content with the purposes of meeting the CPD requirements of the FAIS Act, the **cost per course will be R580**.

13 About Milpark Education

Milpark Education offers a range of **higher education qualifications, accredited** by the Higher Education Quality Committee (HEQC) of the Council on Higher Education (CHE). Milpark Education offers distance **learning and contact learning**, as well as supporting workshops. The qualifications include a variety of certificate, diploma, **undergraduate and postgraduate degrees, an MBA and a DBA**.

[Learn More](#)

14 Disclaimer

The content of this **brochure is accurate at the time** of going to print. Milpark Education reserves the **right to change the programme content** due to changes in legislation, market requirements and other reasons.

Notice of such changes will be published on our website.

**Milpark Education
Become More.**



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www.milpark.ac.za

Apply Now

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