



QUALIFICATION

Postgraduate Diploma
(SAQA ID: 76943; NQF Level 8)

Postgraduate Diploma in FINANCIAL PLANNING



Mode of Delivery:
Distance Learning Online

**We've got you.
You've got this.**

1 Description and Programme Purpose

The purpose of this qualification is to **equip students with the expert knowledge and professional skills required** by practitioners in the financial planning industry. Students will be competent to **provide financial planning services** to a range of individual and corporate clients. Milpark Education's **Postgraduate Diploma in Financial Planning** addresses the educational requirements for the designation of **CERTIFIED FINANCIAL PLANNER® (CFP®)** professional, awarded by **The Financial Planning Institute of Southern Africa (FPI)**.

Learn More

This designation, which is **internationally recognised**, is the highest designation for **financial planners in South Africa**. On completion of the **Milpark Postgraduate Diploma in Financial Planning**, students qualify to register for the **FPI Capstone certification course**, the last step in qualifying for the prestigious **CFP® Professional Certification**.



The **Postgraduate Diploma in Financial Planning** appears on the **Financial Sector Conduct Authority's (FSCA)** list of recognised qualifications for **FAIS Fit** and Proper purposes.

2 Who Should Enrol

The programme is **suitable for**:



People who want to **become expert financial planning** practitioners in order to **provide professional** financial planning services to a range of individual and corporate clients.

3 Programme Outcomes

Successful completion of this qualification should enable the student to:

1. Apply **financial planning** expertise and knowledge in financial planning for the benefit of clients and society.
2. Establish a **planner/client** relationship by **explaining concepts** and services, and client responsibilities – all within the **parameters of professional** conduct.
3. Assess a client profile, **obtain documented personal information** and determine the current financial status of a client.
4. Determine the **financial goals** (capital, risk and investment needs) of a client.
5. Present a plan to a **client for approval** and agreement.
6. Implement, manage and monitor such plan within the **ethical constraints** of the profession, **testing effectiveness** and **recommending** change where necessary.

**We're online.
We've got space.**



4

Programme Structure

Module name and code		Compulsory/ Elective	Credits
Induction to Financial Planning INDFP1-8		Compulsory	None
Financial Planning Environment PGFPEN-8		Compulsory	20
Personal Financial Planning	Risk and Estate Planning PFPRES-8	Compulsory	20
	Retirement Planning PFPREP-8	Compulsory	20
	Investment Planning PFPINP-8	Compulsory	20
Corporate Financial Planning PGCFPL-8		Compulsory	20
Case Study PGSTU-8		Compulsory	20
TOTAL			120

5

Mode of Learning

The programme will be offered via **Distance Learning Online (DLO)**. DLO is our fully digital, guided and flexible study experience designed to support independent learning with structured engagement.

Through our **online platform**, students **access all learning materials** – including textbooks – and participate in live online classes, discussion forums and collaborative projects. **DLO fosters meaningful** interaction while allowing students to study at their own pace.

With **downloadable resources and flexible access**, it accommodates varying connectivity needs and offers a rich, **inclusive learning** journey tailored to diverse student contexts.



* Modules are shown in alphabetical order. Please see **RULES OF PROGRESSION** for the recommended order of study.

Case Study PGCSTU-8

The Case Study module is used to **integrate the knowledge** of all the other modules in order to enable students to prepare a comprehensive financial plan for a client. **Students are also expected** to apply knowledge of current affairs (such as the current economic climate) to **advise clients of its impact** on financial planning.

This module deals with **financial planning from a business** needs perspective. It covers the different types of **business entities**, reading financial statements, employee benefits, business assurance solutions and health planning.

Corporate Financial Planning PGCFPL-8

Financial Planning Environment PGFPEN-8

This module provides a broad, yet **detailed introduction** to the field of **financial planning**. It covers income tax in detail. The **legislation that impacts the regulatory** environment is also covered extensively.

This module **provides students with an introduction** to the qualification and the online method of delivery. The **focus of the content** will be on the financial calculations required at this level and a review of **personal income tax principles**. It also includes an overview of all the different financial planning products used in financial planning to meet clients' needs. The content of this **module provides ideal preparation** for the more advanced concepts in the core **modules of the qualification**. This module is non-credit bearing.

Induction to Financial Planning INDFP1-8

Investment Planning PFPINP-8

This **module aims to enable students** to appropriately advise clients regarding their **investment needs**. It incorporates an **in-depth knowledge of the structure**, nature, tax consequences, features and benefits of various products that are **designed to address** clients' investment needs by analysing a client's **current investment portfolio** and future investment needs.

This module is **aimed at providing students** with the required knowledge to **conduct a capital needs analysis** for a client before or at retirement stage and to provide **comprehensive advice** to address the capital shortfall, or alternatively, to be able to consider the **structure and tax implications** of different **retirement funds** on the client's situation at retirement stage.

**Retirement
Planning
PFPREP-8**

**Risk and Estate
Planning
PFPRES-8**

In this module, the **student will be provided with an in-depth** knowledge of the structure, nature, tax consequences, features and **benefits of various products available** to address risk needs. Students will learn to conduct a **capital needs analysis** to provide comprehensive advice to clients to address their risk needs. In addition, this module focuses on the **impact of the different marital** regimes on the capacity and estate of a person, testate and intestate succession, limited rights that can be created, trusts and formalities for a valid Will to enable students to **provide advice to individuals on financial** needs based on an analysis of their situation.

7 2026 Timetable

Registration closing date	06 January (Cycle 1) 9 weeks	10 March (Cycle 2) 10 weeks	19 May (Cycle 3) 9 Weeks	21 July (Cycle 4) 10 weeks	29 September (Cycle 5) 9 weeks
Start date	13 January	17 March	26 May	28 July	06 October
Modules	PGCFPL-8 INDFP-8	PGCSTU-8 PGFPEN-8 PFPINP-8 IND- FP-8	PFPREP-8 PGCFPL-8 PFPRES-8 INDFP-8	PGCSTU-8 PFPINP-8 PGFPEN-8 INDFP-8	PFPRES-8 PFPREP-8 INDFP-8
Exam date	16 March	25 May PGCSTU-8: 8 June	27 July	5 October PGCSTU-8: 19 October	07 December

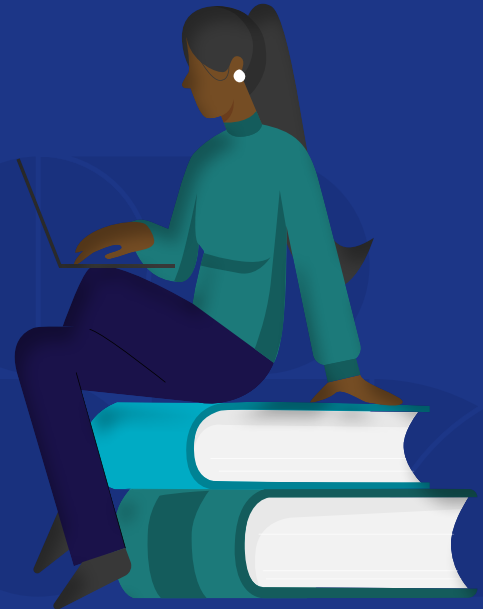


8

Admission Requirements

The minimum admission requirement for the **Postgraduate Diploma in Financial Planning** is an appropriate bachelor's degree at NQF level 6 (old) or 7 (new) or equivalent.

An **appropriate bachelor's degree** is one that focuses on financial planning – such as a **BCom in Financial Planning** – or includes substantial coursework in taxation, investments and financial planning legislation. Suitable qualifications **may include an LLB** with insurance modules, a **BCom in Accounting** or a **BCom in Wealth Management**, depending on the specific modules completed. This list is not exhaustive, and **applicants are encouraged** to apply with any BCom degree they believe meets the criteria.



[Learn More](#)

A **pass in Matric mathematics on higher grade or a C symbol** on standard grade or equivalent is also required. **Relevant post-matric studies** which demonstrate familiarity with the mathematical abilities required will be considered.

Applicants are requested to **submit a detailed curriculum vitae** displaying details of **employment for the previous ten years**, which will be used as part of the curriculum planning process. Applicants without extensive experience in **financial planning** will be required to complete the qualification over a **minimum period of two years**.



In line with our **admission policy**, applicants with insufficient/no/outdated **tax knowledge** may be admitted on condition that they successfully complete the *Induction to Financial Planning INDFP1-8* and the *Financial Planning Environment PGFPEN-8* modules, in this order, before being allowed to register for further modules.

Recognition of Prior Learning (RPL) applications

Milpark admits a small number of students onto its programme via **Recognition of Prior Learning (RPL)**. **Entry via RPL is possible upon** application to the **Programme Oversight Manager**, but numbers are limited by legislation. **Applicants with relevant** work experience and an **NQF level 5 qualification in financial planning** or wealth management **as well as an NQF level 6 qualification** in financial planning are encouraged to apply via this route.

Academic performance on these qualifications will be considered and full academic transcripts are to be provided. A **minimum average of 60%** on the NQF level 6 qualification is strongly advised.

In addition, **full details of employment** and a detailed curriculum vitae are required, and relevant experience as a **financial adviser/planner** will be a decisive consideration.

In line with our **admission policy**, applicants who receive conditional admission via the RPL admission process will be expected to successfully complete the Induction to *Financial Planning INDFP1-8* and the *Financial Planning Environment PGFPEN-8* modules, in this order, before they receive full admission to the qualification.

[Learn More About The RPL Requirements](#)

**We've got you.
You've got this.**



Other certificates

An **applicant who has a certificate** other than a **South African National Senior Certificate** and any international bachelor's degree, and who wishes to enrol for a Postgraduate qualification, must obtain a **SAQA certificate** of equivalence (www.saqa.org.za).

Foreign nationals residing in South Africa on a temporary visa must provide proof from the **South African Home Affairs offices** that they are permitted to study and enrol for studies at the **tertiary level**.



9 Mode of Delivery

The **Department of Higher Education and Training** has registered the programme, and the Council on Higher Education has accredited the programme,

Learn More

The following mode is available for this specific programme:



**Distance
learning
(DL)**

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](#)

11

Student Support

Library access

The Milpark Library **provides access to e-books** in a virtual library called Cyberlibris (Scholartext). Students can 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** on 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), Emerald (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 dedicated online lecturers 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).

12

Rules of Progression

All modules are compulsory, and students will be advised of their proposed study plan on admission, as individual **curriculum planning is conducted**.



Students need to complete Induction to *Financial Planning INDFP1-8* before being allowed to **register for any additional modules**. Students who have not completed Taxation on at least an NQF level 6 will be expected to successfully complete *Financial Planning Environment PGFPEN-8* before registering for any additional modules. **Students are advised to complete Investment Planning PFPINP-8** as one of their last modules before attempting *Case Study PGCSTU-8*. Attempting *Retirement Planning PFPREP-8* is a prerequisite for *Investment Planning PFPINP-8*. *Case Study PGCSTU-8* may not be attempted unless all the other modules have been attempted.

Students can **only register for one module per exam sitting**. For the **2026 academic year**, an exam sitting will be available every nine or ten weeks, depending on the module. The exam sitting for the *Case Study* module will be available **within 12 weeks of the start of the module**.

13 Assessment

Formative assessment contributes **40% towards the student's final mark**.

All modules have weekly compulsory assignments and compulsory online tests as formative assessment. *Financial Planning Environment PGFPEN-8* and *Case Study PGCSTU-8* have a timed online assessment, scheduled for a specific date and time during business hours. Students must take the day off from work to complete the assessment.

Students will complete a final, summative assessment at the end of each cycle, which contributes **60%** towards the final mark. Students need to obtain a sub-minimum mark of **40%** in the final, summative assessment and an overall mark of **50%** to pass the module. Supplementary examinations are available to qualifying students.



14 Duration

Students have a **maximum of three years** to complete the qualification. **Please note** that the Head of the Department will prescribe a study programme for the completion of the qualification. Students who are not able to **study during a particular year** are encouraged to inform Milpark of their circumstances.

15

Certification

On successful completion of the qualification, the student will receive a **Postgraduate Diploma in Financial Planning, NQF Level 8 (credits: 120)**. The Postgraduate Diploma in Financial Planning is accredited by the **Higher Education Quality Committee of the Council on Higher Education (CHE)**.

16

Further Studies

Milpark Education is committed to the process of lifelong learning and opening access to higher education. **The programme is at NQF level 8** and it will provide for articulation options into NQF level 9 programmes.

A student who has completed certain modules on this qualification at Milpark Education and who wishes to transfer to another **tertiary-level institution** should be able to apply for exemption from relevant modules on the basis of the modules that have been passed at **Milpark Education**. **Articulation to Milpark's Master of Business Administration (MBA)** is possible.

17

Pricing



All module **fees include one round of formative and summative assessments** (excluding supplementary examinations). **Module fees do not include** the cost of prescribed textbooks, which will be for your own account. The prescribed book list will be available on *myMilpark* upon registration.

Study guides will be **provided in electronic** and print format at no extra cost.

18

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.**

Website:

www.milpark.ac.za

Apply Now

Enquiries

Tel: (086) 999-0001

Deneb House

3rd Floor | 368 Main Road

Observatory | Cape Town

7925 | PO Box 44235

Claremont | 7735

M

**We've got you.
You've got this.**

