



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®**, 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 will gain access to the FPI Capstone Course for the CFP® Certification.

2 Who Should Enrol

The programme would be suitable for:

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The programme would be suitable for persons who want to **become expert financial planning practitioners** in order to provide professional financial planning services to a range of individual and corporate clients.

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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.

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 PGCSTU-8		Compulsory	20
TOTAL			120

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Module Descriptions

* 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 focuses on **Employee Benefits and Business Assurance**. Students will be expected to draft a comprehensive financial plan for a corporate client.

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 on the regulatory environment is also covered extensively.

This module provides students with an introduction to the qualification and the online method of delivery. The **main focus of the content will be on the financial calculations** required on this level and a review of personal income tax principles. Students will also be introduced to the available financial planning products. 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 in order 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.

6 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.

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.

[Learn More](#)

Other / International certificates

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



[Learn More about Recognition of Prior Learning \(RPL\) applications](#)

7 Mode of Delivery

Choose an online format that works for you. **Studying online requires** certain skills such as self-discipline, self-motivation and communication. When you're an online learner, you'll find that you will quickly hone and develop these skills which are important for the workplace.

[Learn More](#)

The following mode is available for this specific programme:



Distance
Learning
Online

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Technical Requirements

[View Requirements](#)



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Student Support

Library access

The Milpark Library provides access to **e-books in a virtual library** called Cyberlibris (Scholartext). Lecturers create smart bookshelves per course or module for students to access (these shelves can contain prescribed and recommended books). Students can also 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), Ebsco (global), Emerald (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 tutors 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)*.

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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*. *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 passed.

Students can only register for one module per exam sitting. For the 2025 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**.

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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 an online assessment, which students are expected to complete on a predetermined date and within a set time limit. This test is scheduled during business hours.



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%** in order to pass the module. Supplementary examinations are available to qualifying students.

12 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.

13 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).

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14 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.

15 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 on registration. Study guides will be provided in electronic and print format at no extra cost.

16 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](#)

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