

MILPARK EDUCATION
Financial Services

QUALIFICATION

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

Postgraduate Diploma in **FINANCIAL PLANNING**

Recognised FSCA Financial Sector Conduct Authority

Recognised FPI 2025 RECOGNISED EDUCATION PROVIDER

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)**.

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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 PGCSTU-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.



6 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.

Corporate Financial Planning PGCFPL-8

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.

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.

Induction to Financial Planning INDFP1-8

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.

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.

Retirement Planning PFPREP-8

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.

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

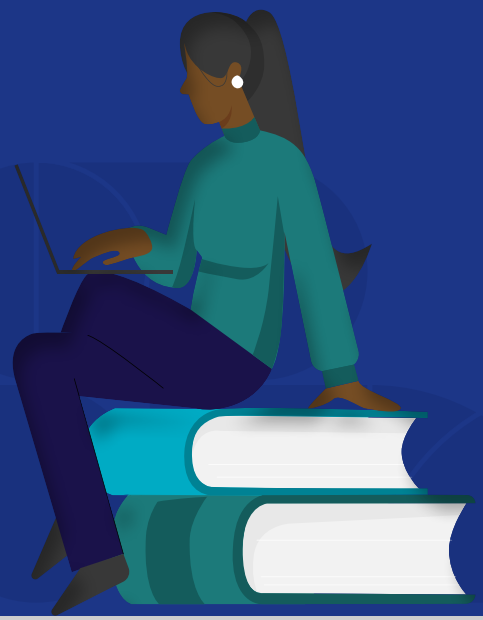
Registration closing date	06 January **(Cycle 1)** 9 weeks	10 March **(Cycle 2)** 10 weeks	19 May **(Cycle 3)** 9 Weeks	21 July **(Cycle 4)** 10 weeks	29 September **(Cycle 5)** 9 weeks
Start date	**13 January**	**17 March**	**26 May**	**28 July**	**06 October**
Modules	PGCFPL-8 INDFP-8	PGCSTU-8 PGFPEN-8 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.



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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

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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,

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The following mode is available for this specific programme:

Distance learning (DL)

10 Access to **Technology**

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

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