UNIVERSITY OF KWAZULU-NATAL™
INYUVESI YAKWAZULU-NATALI

Postgraduate Diploma in Financial Planning

A Career in Financial Planning

Attaining a professional designation will help you stand out for recruiters and prospective employers

In order to prepare for your future, you will need to find a way that you can manage your finances to achieve your life goals. Financial Planning does this, and the financial planning process is important in developing a plan that is tailored to your own unique circumstances. Having a detailed financial plan provides a strategy to help you make critical financial decisions in all aspects of life, and following that plan affords you the best possible chances of success in achieving your life goals and long-term financial security.

Given the complexities and financial uncertainty that the world faces on a daily basis, financial planning professionals are in high demand and a qualification in Financial Planning offers a career path filled with numerous rewarding opportunities. The Postgraduate Diploma in Financial Planning offered by the School of Accounting, Economics and Finance at the University of KwaZulu-Natal, is accredited by the Financial Planning Institute of Southern Africa (FPI), and is designed to admit students or professionals to the qualifying Professional Competency Examination.

WHAT YOU WILL LEARN

- Enhance your leadership skills through articulation and implementation of a robust and well-defined financial strategy.
- Improve the quality and accessibility of professional financial planning.
- Provide a leadership role within financial services by providing balanced, credible input and commentary to your clients and the public.
- Lead transformation and diversity in the Financial Planning profession.
- Empower consumers by creating awareness of the benefit of professional planning through financial education.

Accredited by

FPI
Financial Planning Institute of Southern Africa
THE PROFESSIONAL STANDARD

INSPIRING GREATNESS

KEY FOCUS AREAS

- Establishing and defining a professional relationship
- Gathering data, including goals
- Analysing and evaluating your financial status
- Developing and presenting financial planning recommendations and/or alternatives
- Implementing financial planning recommendations
- Monitoring financial planning recommendations

PROGRAMME MODULES

- Financial Management
- Retirement Planning
- Tax and Estate Planning
- Risk Management and Ethics
- Wealth Management
- Law of Contract, Insurance and Agency
- Integrated Financial Planning

WHO SHOULD ATTEND

This programme is aimed at individuals working within the Financial Services industry, wanting to complete the FPI's Professional Competency Examination as well as those outside of the industry wishing to pursue a career in financial planning.

ENTRANCE REQUIREMENTS

- A three-year tertiary degree or equivalent at NQF Level 7 from any SAQA recognised institution OR
- Evidence of qualification at NQF Level 7 or Recognition of Prior Learning (RPL).

DURATION

- One year full-time or two years part-time (evening classes, Monday to Thursday 17:30 to 20:30).
- Modular: Block sessions may be offered (dependent on demand).
- Registrations are permitted mid-way into the year.

FACILITATORS

Prof Walter Geach

Professor Geach is an Advocate of the High Court of South Africa and a Chartered Accountant (SA), Professor and Head of School of Accounting at UWC and Fellow of the University of KwaZulu-Natal. His areas of specialisation include Financial Accounting, Taxation, Corporate Governance, Business Law and Financial Services. Professor Geach is a well published author in the field of Tax, and is a principal author of the *South African Financial Planning Handbook*.

Dr Pravin Thakur

Dr Thakur is a Financial Planner at Liberty. He has extensive industry experience and holds a PhD in Education (Wits), as well a PG Diploma and Advanced PG Diploma in Financial Planning (UFS). Pravin is the current Chair of Million Dollar Round Table (SA). His professional affiliations include, FPI (SA), FIA (SA), MDRT (International), and he is a Council member of the Durban Chamber of Commerce and Industry.

Dr Prince K. Sarpong

Dr Sarpong holds a PhD in Finance from the University of KwaZulu-Natal and has completed a PG Diploma in Financial Planning from NMMU. He is a Certified Financial Planner and a member of the Investment Competency Committee of the FPI (SA). As an academic researcher, Dr Sarpong has published in DHET accredited journals and presented at several professional conferences. His research focus is on the areas of unit trusts/mutual fund investments and behavioural finance.

PROGRAMME FEE

The programme fee of approximately R34 000 (incl. VAT) covers tuition. Please see the annual Student Fees Guide for more detailed information.

DATES

The programme follows UKZN's sessional dates, which can be viewed at www.ukzn.ac.za.

FOR COURSE DATES AND MORE INFORMATION CONTACT US

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