UNIVERSITY OF KWAZULU-NATAL™
INYUVESI YAKWAZULU-NATALI

Postgraduate Diploma in Financial Planning

A Career in Financial Planning

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

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 (PCE). PCE is one of the requirements towards becoming a Certified Financial Planner (CFP) professional that creates new career opportunities, including financial and investment advisor, estate planner and tax practitioner.

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

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
- Research Methodology

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.

PROGRAMME FEE

The programme fee of approximately R44 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.

Closing date for 2022 applications is 30 September 2021.

ENTRANCE REQUIREMENTS

- A three-year relevant tertiary degree or equivalent at NQF Level 7 from any SAQA recognised institution OR
- Evidence of qualification at NQF Level 7 OR
- Evidence of relevant qualification at NQF Level 6 and minimum of two- year relevant work experience can also apply using Recognitionof Prior Learning (RPL).

DURATION

- One year full-time or two years part-time (evening classes, Monday to Thursday 17:30 to20:30).
- Modular: Block sessions may be offered (dependent on demand).
- Registrations are permitted mid-way into the year.

FOR COURSE DATES AND MORE INFORMATION CONTACT US

WESTVILLE CAMPUS
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