

ADVANCED DIPLOMA IN FINANCIAL PLANNING

AdvDip (Financial Planning) - NQF Level 7 (120 credits)

Qualification code: **ADFP20**

SAQA ID: 112125, CHE NUMBER: H/H16/E150CAN

Campus where offered:

Ga-Rankuwa Campus

REMARKS

- a. *Admission requirement(s):*
A Diploma in Financial Planning, **or** a relevant bachelor's degree, **or** an equivalent qualification at NQF Level 6 with a minimum of 360 credits.
- Holders of any other equivalent South African or international qualification may also be considered, see Chapter 1 of Students' Rules and Regulations.
- b. *Selection criteria:*
Admission is subject to selection. Acceptance is subject to available capacity according to the Student Enrolment Plan (SEP). Applicants will be informed of their status per official letter from the Office of the Registrar, alternatively, they can check their application status on the TUT website, www.tut.ac.za.
- c. *Recognition of Prior Learning (RPL), equivalence and status:*
See Chapter 30 of Students' Rules and Regulations.
- d. *Intake for the qualification:*
January only.
- e. *Presentation:*
Day classes. Saturday classes are offered to working students on Ga-Rankuwa Campus.
- f. *Minimum duration:*
One year.
- g. *Exclusion and readmission:*
See Chapter 2 of Students' Rules and Regulations.
- h. *WIL Financial Planning IV (Simulation):*
See Chapter 5 of Students' Rules and Regulations.

CURRICULUM

ATTENDANCE

CODE	MODULE	NQF-L	CREDIT	PREREQUISITE MODULE(S)
WFP107V	WIL in Financial Planning IV (Simulation)	(7)	(24)	

FIRST SEMESTER

ABM117V	Advanced Business Communication IVA	(7)	(12)	
AMA117V	Asset Management IVA	(7)	(12)	
ETL117V	Estate and Tax Planning IVB	(7)	(12)	
FIA117V	Finance IVA	(7)	(12)	



SECOND SEMESTER

AMB117V	Asset Management IVB	(7)	(12)	Asset Management IVA
FIB117V	Finance IVB	(7)	(12)	
RMG117V	Risk Management IVB	(7)	(12)	
RTP117V	Retirement Planning IVB	(7)	(12)	

TOTAL CREDITS FOR THE QUALIFICATION: **120**

MODULE INFORMATION (OVERVIEW OF SYLLABUS)

The syllabus content is subject to change to accommodate industry changes. Please note that a more detailed syllabus is available at the Department or in the study guide that is applicable to a particular module. At time of publication, the syllabus content was defined as follows:

A

ADVANCED BUSINESS COMMUNICATION IVA (ABM117V) 1 X 3-HOUR PAPER

(Module custodian: Department of Finance and Investment)

Building blocks of effective messages; the communication process; communicating across cultures; employment seeking skills; proposals and reports; and communicating across cultures. (Total notional time: 120 hours)

ASSET MANAGEMENT IVA (AMA117V) 1 X 3-HOUR PAPER

(Module custodian: Department of Finance and Investment)

Securities (shares, bonds and other securities) and other assets (e.g. real estate) in order to meet specified investment goals for the benefit of the investors. Core content includes Investment principles; Investment objectives, constraints and suitability; Behavioural finance, and Asset classes and securities. (Total notional time: 120 hours)

ASSET MANAGEMENT IVB (AMB117V) 1 X 3-HOUR PAPER

(Module custodian: Department of Finance and Investment)

Returns on assets considering the client's requirements and restrictions and life objectives as well as to understand: various types of securities traded in financial markets, investment theory and practice, portfolio construction and management, and investment strategies and tactics. (Total notional time: 120 hours)

E

ESTATE AND TAX PLANNING IVB (ETL117V) 1 X 3-HOUR PAPER

(Module custodian: Department of Finance and Investment)

Basic estate and tax planning principles within the context of South African legislation. Core content includes Interpretation of a will; Calculation of capital gains tax and estate duty; Analysing the liquidity of an estate; After analysing of estate, and Implement proper estate planning. (Total notional time: 120 hours)

F

FINANCE IVA (FIA117V) 1 X 3-HOUR PAPER

(Module custodian: Department of Finance and Investment)

The student to develop strategies and use techniques to optimise short- and mid-term cash flow, assets and liabilities, as well as to collect and synthesise information relating to personal financial statements, cash flow and debt, asset acquisition, liabilities, education planning and emergency fund provision. (Total notional time: 120 hours)

FINANCE IVB (FIB117V) 1 X 3-HOUR PAPER

(Module custodian: Department of Finance and Investment)

The student to develop strategies and use techniques in sources funding and the capital structure of corporations, the actions that managers take to increase the value of the firm to the shareholders, and the tools and analysis used to allocate financial resources. Core content include budget planning; Savings analysis and strategy; Emergency fund; and Credit and debt management. (Total notional time: 120 hours)



R

RETIREMENT PLANNING IVB (RTP117V)

1 X 3-HOUR PAPER

(Module custodian: Department of Finance and Investment)

Retirement principles; Retirement objectives; Retirement needs analysis and projections; Retirement strategies; and Retirement products. (Total notional time: 120 hours)

RISK MANAGEMENT IVB (RMG117V)

1 X 3-HOUR PAPER

(Module custodian: Department of Finance and Investment)

Risk management principles; Insurance planning; Analysis and evaluation of risk exposures; Risk strategies; Insurance law and claims process; and Product/adviser/company selection and due diligence. (Total notional time: 120 hours)

W

WIL IN FINANCIAL PLANNING IV (SIMULATION) (WFP107V)

**SIMULATED WORK-INTEGRATED
LEARNING**

(Module custodian: Department of Finance and Investment)

Knowledge in applying financial planning principles to case studies that will be including financial planning principles, corporate finance principles, estate and tax planning principles, professional, standards and ethics, and working capital while developing strategies, recommendations and financial plans for clients using real world situations and facts. (Total notional time: 240 hours)

