POSTGRADUATE DIPLOMA IN
FINANCIAL PLANNING

The Postgraduate Diploma in Financial Planning offered by the School of Accounting, Economics and Finance at the University of Kwazulu-Natal has been designed to provide students from commerce and non-commerce backgrounds with the necessary theoretical knowledge to follow a career in Financial Planning. The knowledge of financial planning gained will create new career opportunities in the financial services sector like banks, insurance companies, pension funds and asset management companies. Upon completion of this programme, students would be able to apply to write the Board exams leading to the Certified Financial Planner designation.

CORE MODULES

Financial Management
This module provides students with an in-depth of determinants of client's personal financial decisions, personal financial management strategies, personal finance products, and insolvency and bankruptcy

Law of Contract, Insurance and Agency
To purpose of this module is to give learners the capacity and ability to understand, analyse, research, discuss, evaluate, give correct advice concerning, and generally deal effectively with, issues of contract law, insurance and agency and legal disputes thereof.

Research Methods
The module focuses on designing a research project, structuring an inquiry, and the ethics and politics of business research. The course covers literature review skills, the tools of theory building, interviewing skills, designed a questionnaire, indexes/typologies and asking questions. The nature of quantitative research is also covered.

Retirement Planning
This module provides students with an in-depth knowledge of institutional vehicles for retirement funds and personal retirement and savings funds.

Risk Management & Ethics
This module provides students with an in-depth analysis of client's quantitative and qualitative information such as insurance coverage, potential financial obligations, risk management objectives, risk tolerance, lifestyle issues, health issues and development of risk management strategies.

Wealth Management
This module provides learners with an in-depth understanding of investment vehicles, portfolio management, behavioural finance, economic analysis and performance measurement.

Tax & Estate Planning
This module provides learners with an in-depth knowledge of tax and estate planning

Integrated Financial Planning
This modules seeks to help the students demonstrate critical thinking in decision making that integrates risk management and ethics, financial management, wealth management, tax and estate planning, retirement planning and alternative investments while developing strategies, recommendations and financial plans for clients using real world situations and scenarios.

Duration
The programme can be completed in one year of full-time study or two years of part-time study. Part-time students can start in the middle of the year. Lectures are held from Mondays to Thursdays between 17h30 and 20h30 on the Westville Campus.

Entrance Requirements
To be considered for the programme, the applicant should have a recognized undergraduate degree or a three-year tertiary qualification from a recognised institution or equivalent.

Contact us
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E-mail: saefpostgrad@ukzn.ac.za
Physical Address: University Road, Chiltern Hills, Westville

Application forms can be obtained on the UKZN **website:** http://www.ukzn.ac.za

Closing date for applications is 30 November.

UNIVERSITY OF KWAZULU-NATAL ™
INYUVESI YAKWAZULU-NATALI

INSPIRING GREATNESS