

## POSTGRADUATE DIPLOMA IN FINANCIAL PLANNING

PGDip (Financial Planning) - NQF Level 8 (120 credits)

**Qualification code: PDP21**

SAQA ID: 111317, CHE NUMBER: H/H16/E151CAN

Campus where offered: Ga-Rankuwa Campus

**Please note that this programme is not currently offered.**

### REMARKS

- a. *Admission requirement(s):*  
An Advanced Diploma in Financial Planning, **or** a bachelor's degree, **or** an equivalent qualification at NQF Level 7.
- 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](http://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 offered on Saturdays.
- f. *Minimum duration:*  
One year.
- g. *Exclusion and readmission:*  
See Chapter 2 of Students' Rules and Regulations.

### CURRICULUM

#### ATTENDANCE

CODE	MODULE	NQF-L	CREDIT
CFM108G	Corporate Financial Management V	(8)	(24)
CSS108G	Case Studies V	(8)	(24)
FPV108G	Financial Planning Environment V	(8)	(24)
PNM108G	Personal Financial Management V	(8)	(24)
RFR108G	Research Project V	(8)	(24)
TOTAL CREDITS FOR THE QUALIFICATION:			<b>120</b>



## 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:

### C

#### **CASE STUDIES V (CSS108G) 1 X 3-HOUR PAPER**

*(Module custodian: Department of Finance and Investment)*

Critical thinking, make decisions and integrate among the Curriculum Components (Principles and Practices of Financial Planning, Financial Management, Asset Management, Risk Management, Tax Planning, Retirement Planning and Estate Planning) while developing strategies, recommendations and financial plans for clients using real world situations and facts. (Total notional time: 240 hours)

#### **CORPORATE FINANCIAL MANAGEMENT V (CFM108G) 1 X 3-HOUR PAPER**

*(Module custodian: Department of Finance and Investment)*

This module prepares the student to develop strategies and use techniques to optimise returns on assets considering the client's requirements and constraints 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: 240 hours)

### F

#### **FINANCIAL PLANNING ENVIRONMENT V (FPV108G) 1 X 3-HOUR PAPER**

*(Module custodian: Department of Finance and Investment)*

Extensive financial planning information and principles including: the financial planning process, client interactions and behaviour, time value of money applications, ethical and practice standards for financial planning, compliance issues, economics, and the regulatory environment of the applicable jurisdiction. (Total notional time: 240 hours)

### P

#### **PERSONAL FINANCIAL MANAGEMENT V (PNM108G) 1 X 3-HOUR PAPER**

*(Module custodian: Department of Finance and Investment)*

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: 240 hours)

### R

#### **RESEARCH PROJECT V (RFR108G) CONTINUOUS ASSESSMENT**

*(Module custodian: Department of Finance and Investment)*

Knowledge and understanding of the fundamental principles of applied research in a financial planning environment. (Total notional time: 240 hours)

