



Advance Certificate in Financial Planning (ACFP600)

**FACT
SHEET**

Advance Certificate in Financial Planning (ACFP600)

The Advanced Certificate in Financial Planning is designed for individuals seeking to enhance their knowledge and skills in personal and corporate financial planning. The program equips students with the tools to help clients make informed decisions regarding their financial future, including tax strategies, estate planning, investment, retirement, and risk management.

This certificate prepares students to work as professional financial planners in a variety of industries.



Modules

* Prescribed textbooks, must be obtained by students at their own cost prior to the commencement of their studies

Module Codes	Description	Credits	Semester
ACFP601	Financial planning principles and practices	3	1
ACFP602	Tax planning	3	1
ACFP603	Retirement planning	3	1
ACFP604	Estate planning	3	2
ACFP605	Investment planning	3	2
ACFP606	Insurance and risk management	3	2



Assessment strategy

The Advanced Certificate in Financial Planning employs a variety of assessment methods to ensure students have a thorough understanding of financial planning concepts and practices. Assessment methods include:

- **Examinations:** Written exams assessing the theoretical understanding and application of financial planning principles.
- **Assignments:** Case studies and practical assignments to evaluate students' ability to develop and implement financial planning strategies.
- **Projects:** Students will be required to analyze financial scenarios and provide recommendations for clients, simulating real-world planning scenarios.
- **Presentations:** Students may be asked to present their financial plans and strategies, demonstrating communication and decision-making skills.

Admission Requirements

For South African Applicants:

- **Matriculation (National Senior Certificate):** A minimum of 50% in relevant subjects.
- **Work Experience (optional):** Experience in financial services or a related field is beneficial but not mandatory.
- **Language Proficiency:** Strong proficiency in English, both written and verbal.

For International Applicants:

- **Equivalent of South African Matriculation:** Applicants must have a secondary school qualification equivalent to the South African National Senior Certificate, with a minimum of 50% in relevant subjects.
- **English Language Proficiency:** International applicants whose first language is not English may need to demonstrate English proficiency through recognized tests like IELTS or TOEFL.
- **Additional Documentation:** International applicants may be required to provide additional documents such as visa requirements and evaluation of foreign qualifications.

Career Opportunities:

Graduates of the Advanced Certificate in Financial Planning are equipped to pursue a wide variety of career opportunities in the financial planning and advisory sectors. Potential career paths include:

- **Financial Planner/Advisor**
- **Tax Consultant**
- **Investment Advisor**
- **Estate Planning Consultant**
- **Risk Manager**
- **Retirement Planning Specialist**
- **Insurance Advisor**
- **Wealth Management Specialist**
- **Client Relationship Manager in Financial Services**

Graduates can work in financial advisory firms, banks, insurance companies, wealth management firms, or start their own financial planning practice.



Outcomes

Upon successful completion of the program, graduates will be able to:

- Understand and apply the principles and practices of financial planning.
- Develop comprehensive tax and investment strategies that align with client goals.
- Advise clients on retirement planning, including retirement savings and distribution strategies.
- Plan and implement estate planning strategies to manage the transfer of wealth.
- Assess insurance needs and implement appropriate risk management strategies.
- Demonstrate a thorough understanding of the financial planning process and its ethical considerations.

Completion Time

The Advanced Certificate in Banking typically takes one year to complete, divided into two semesters.

- Semester 1: Focus on foundational banking concepts and regulatory frameworks.
- Semester 2: Deepen practical skills in credit management, digital banking, and cybersecurity.