

CARMEN VENTER

NOW



Carmen Venter in association
with Roxanne van Blerk

CASE STUDY PROGRAMME FOR THE PGRAD DIP IN FINANCIAL PLANNING 2019



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Workshop approach and content

Students struggle with the Case Study module. I believe that it is not necessarily lack of knowledge. It seems less difficult to be successful in the other modules and there is one reason for this: Questions are asked outright. There is no analysing and synthesising necessary.

Throughout the year, all assignments are multiple choice. This method of learning throughout your year of studies does not provide you with the skills to tackle the Case Study module successfully.

Students need to skilfully apply the knowledge they have acquired. This is possible if you are taught to 'collect' information provided, analyse the information and provide recommendations that align to the client! The above is the same approach that is needed to be successful in the PCE (board exam with the FPI).

Students will be completing various case studies throughout the year to develop these skills. The outcome of this programme is to ensure that you have the knowledge required, able to apply to the client on hand, how questions are interpreted, analysing, recommending as well as, time management.

Book early to avoid disappointment.

Dates, Times and Venues

VENUE SATURDAYS
Stonemill Office Park, Waterstone House
300 Acacia Road, Darrenwood
(opposite Cresta Shopping Centre)

TIMES: As per schedule below

SEAT LIMITS: 40 students each module per group

Presenters

Carmen Venter – has been in the Insurance & Financial Industry since 1981 becoming a Financial Advisor in 1998. She has obtained an HDIP Tax (RAU) in 2004 and completed her Post Grad Dip in Financial Planning (UFS) in 2007. Carmen also successfully completed in 2011 a Post Grad Dip in Tax (Cum) with UFS obtaining 10 distinctions. She is registered with the FSB and Medical Council. Is a CFP® Professional Member of the FPI, a Master Member with the SA Institute of Tax Professionals and a Fiduciary Planner of SA.

She is an external lecturer at UJ facilitating their BCom Honours in Financial Planning Case Study.

ANY OTHER GUEST SPEAKERS WILL
BE ANNOUNCED AT THE TIME

If you are not:

- reasonably comfortable with your knowledge,
- great at self discipline
- willing to make the effort to work through the papers yourself then this programme is not for you.

Please enquire about the weekly workshops that are available.

Content

- This programme is aimed at students who require only to complete the case study exam and, who are comfortable with their knowledge.
- The programme will cover the full curriculum needed to be successful in the exams and focuses mainly on analysing, synthesising and application.
- It is important that you are comfortable with your knowledge as well as researching any new legislation updates and case law.
- The first session will cover all legislation changes that you require to go forward and methodology.
- Thereafter, the programme focuses on case study papers issued to you, to be completed before the next session.
- The session following is an opportunity for the student to discuss and debate the facilitators solutions and application.

Detailed Schedule for 2019



LECTURE DATE	TIME	TOPIC	SUBMISSION DATE. SOLUTION PROVIDED
Feb 23rd	9:00 am	Orientation UFS and FPI	
March 9th	13:00 – 16:30	Legislation Updates and Methodology	
March 10th		Case Study 1 Emailed for completion	1st April
April 6th	13:00 – 16:30	Case Study 1 Discussion	
		Case Study 2 Emailed for completion	1st May
May 4th	13:00 – 16:30	Case Study 2 Discussion	
		Case Study 3 Emailed for completion	29th May
June 1st	13:00 – 16:30	Case Study 3 Discussion	
		Case Study 4 Emailed for completion	3rd July
June 29th	13:00 – 16:30	Case Study 4 Discussion	
		Case Study 5 Emailed for completion	24th July
July 27th	13:00 – 16:30	Case Study 5 Discussion	
		Case Study 6 Emailed for completion	21st August
August 31st	08:30 – 12:30	Case Study Exam	
	13:00 – 16:30	Case Study 6 For Discusion and closure	

CASE STUDY GUIDELINES ARE ISSUED EARLY IN THE YEAR AND WILL ALREADY BE INCORPORATED IN THE 6 CASE STUDIES ABOVE.

CARMEN VENTER

PGrad Dip in Financial Planning 2019

REGISTRATION FORM – CASE STUDY PROGRAMME

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Office: 011 026 9409 | Cell: 082 880 7192 | Fax: 086 276 0658

Name:
Surname:
Identity Number:
Occupation:
Previous experience/education:
Are you repeating any modules?
Please share with me your areas of concern:
Postal Address:
Business contact:
Cell Number:
Email address for general communication:
Alternative email address:
Fax Number:
Student Number:
Signature:
Date signed:

Case Study: (VAT excl)	Cost
TOTAL PAYABLE: (VAT EXCL))	R13 150.00
Early bird payment in full: 5% off quoted fee	

Method of payment Please tick ✓		PAYMENT REQUIRED FOR RESERVATION OF SEAT.	
Please include	<input type="checkbox"/>	Eft	<input type="checkbox"/>
	<input type="checkbox"/>	Cash	<input type="checkbox"/>

Payment:

Eft payments to be made to: C Venter
 Bank: Standard Bank, Braamfontein
 Branch Code: 004805
 Cheque Account number: 200379429

Terms and Conditions

To secure your booking

Please ensure that payment is made by no later than 4th March unless otherwise arranged and agreed upon. If no payment is received or arrangement made before then, your seat will be allocated to the next student on the waiting list and printed material for your module will not be distributed.

Deferred payment arrangement

3 months deferred payment can be arranged if 2 or more modules are registered for. This arrangement has to be approved by Carmen Venter and students are requested to adhere and not modify the arrangement as they see fit. The 1st payment will be due on the 6th March to secure booking. You agree not to default on any outstanding payments if you decide to quit the programme/cancel your studies for any reason other than for medical reasons or emigration. Material will be delivered only for the module/session paid for.

Cancellations

Unless another student takes over your booking – no refunds. If refunds are agreed to, this will be done proportionately.

I hereby agree to the above terms and conditions:

Signed at _____ on this day _____ 2019

 Student Signature

