

# CARMEN VENTER

NOW



Carmen Venter in association  
with Roxanne van Blerk

## WORKSHOPS FOR THE PGRAD DIP IN FINANCIAL PLANNING 2019



### Dates, Times and Venues

**VENUE** Stonemill Office Park, Waterstone House  
Training Room, First Floor  
300 Acacia Road, Darrenwood  
(opposite Cresta Shopping Centre)

**TIMES:** 08h30 – 12h30

**SEAT LIMITS:** 40 students each module per group

Enquire about our Online Programme on the CPD Hub.

### Workshop approach

From the beginning of launching these workshops up until today, students excel in the theory component of their studies but finding it immensely difficult to apply the knowledge acquired. The question remains: if you cannot apply the knowledge that you have acquired, how then can you move into the space where synthesising is required?

The aim of the workshops is to assist you in, not only being successful in the Post Grad Dip exams but, to prepare you for the PCE (board exams) as well!

To achieve what I am set out to do, the number of students accepted for the workshop is limited to 40 a module. This allows an environment where active participation is possible and encouraged. The only way to learn and understand what it is you are doing, is if all have the time and space to interact and complete as many examples as possible.

Book early to avoid disappointment.

### Workshop content

Students are provided with additional material to make reference to for each session. Reading the material as well as completing the examples in the material provided, before each session, is essential. This discipline will ensure a basic understanding of the topic that will be discussed as well as comparing your solution to that discussed at the session.

Please refer overleaf for times and venues.

The programme indicates the sessions that require your attendance for the module/s that you have registered for.

### Presenters

The main presenter and facilitator of the workshops will be Carmen Venter.

**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.

**Presenters that may form part of the team for 2019 – will all be confirmed closer to the time.**

**James Skuse CFP®**  
Investments Specialist

**Yatish Singh**  
BCom Honours: Financial Planning

**Roxanne Van Der Venter CFP®**  
Health Care Specialist

**Faeza Khan CFP®**  
Legal Specialist Liberty Life

ANY OTHER GUEST SPEAKERS WILL  
BE ANNOUNCED AT THE TIME

ORIENTATION GUESTS INCLUDE SHIRLY HYLAND,  
DIRECTOR AT UFS AND A REPRESENTATIVE OF FPI.



PO Box 6571 | Westgate 1734

Office: 011 026 9409 | Cell: 082 880 7192

Fax: 086 276 0658

carmen@synergialearning.co.za/carmenventer@discoverymail.co.za

www.synergialearning.co.za

# Detailed Schedule for 2019



MONTH	DAY	TOPIC	Module
Feb	23rd	Orientation with S Hyland (UFS) & FPI	ALL
March	2nd	Time Value of Money 1 (Fin Calcs)	LFPE/LFPP/LFPS
	9th	Time Value of Money 2 (Fin Calcs)	LFPE/LFPP/LFPS
	16th	Marital Regimes and law of succession	ALL
	23rd	Personal Income Tax 1	ALL
	30th	Personal Income Tax 2	LFPE/LFPP/LFPS
	6th	Personal Income Tax 3 & Capital Gain Tax 1	LFPE/LFPP/LFPS
April	13th	Capital Gain Tax 2	LFPE/LFPP/LFPS
	4th	Lump Sum Taxation & Corporate tax	ALL
May	11th	Trusts and Taxation	ALL
	18th	Estate duty Framework	ALL
	25th	Investment 1	LFPP/LFPS
June	1st	Investment 2	LFPP/LFPS
	8th	Estate Duty and Liquidity	LFPP/LFPS
	15th	Estate Duty and Limited Interests	LFPP/LFPS
	22nd	Estate Planning	LFPP/LFPS/LFPC
July	29th	Retirement Planning	LFPP/LFPS
	6th	Financial Management: Personal / Corporate	LFPP/LFPC/LFPS
	13th	Business Entities and Corporate Tax	ALL
	20th	Business Assurance 1: Buy and Sell	LFPP/LFPS/LFPC
August	27th	Business Assurance 2: keyman & other	LFPP/LFPS/LFPC
	3rd	Health and Pension Funds	LFPC/LFPS
	10th	Case Study 1	LFPS
	17th	Case Study 2	LFPS
	24th	Case Study 3	LFPS
	31st	Case Study 4	LFPS
MOCK EXAMS			
ENVIRONMENT	SATUDAY AFTERNOON SESSION	DATE TBA	
CORPORATE	SATUDAY AFTERNOON SESSION	DATE TBA	
PERSONAL	SATUDAY AFTERNOON SESSION	DATE TBA	
CASE STUDY	SATUDAY AFTERNOON SESSION	DATE TBA	

## CARMEN VENTER PGrad Dip in Financial Planning 2019 REGISTRATION FORM

carmen@synergialearning.co.za / carmenventer@discoverymail.co.za  
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: \_\_\_\_\_

FEES EXCLUDING VAT	Sessions	Please tick <input checked="" type="checkbox"/>	Cost
LFPE ONLY	11 SESSIONS		R3 700.00
LFPC ONLY	10 SESSIONS		R3 600.00
LFPP ONLY	20 SESSIONS		R7 600.00
LFPS FULL WORKSHOP	25 SESSIONS		R13 000.00
LFPS ONLY	4 SESSIONS		R6 000.00
ALL 4 MODULES	25 SESSIONS		R13 000.00

COMBINATION			
LFPE AND LFPC			R7 100.00
LFPP AND LFPS			R13 000.00
LFPP, LFPE AND LFPC			R11 800.00
LFPE AND LFPP			R11 800.00
LFPP ANF LFPC			R11 700.00
LFPS AND ANY OTHER MODULE/S			R13 000.00
TOTAL PAYABLE: (VAT EXCL)			R
<b>Early bird payment in full: 5% off quoted fee</b>			

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

### 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 25th February 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