

CARMEN VENTER



2023 ADVANCED DIPLOMA IN ESTATE AND TRUST ADMINISTRATION STUDIES

At Synergia Learning, we are passionate about education, not only focusing on the knowledge learned, but also on the application thereof. We believe, that through our approach, we will help build practices and professionals in the Financial Services field.

- Consultation services with financial planning professionals
- Workshops and online programmes beneficial to all current and future professionals.

The range of topics offered, will enhance any professional practice, irrespective of sector, or anyone who has an appetite for knowledge.

2023 ADVANCED DIPLOMA IN ESTATE AND TRUST ADMINISTRATION STUDIES

carmen@synergialearning.co.za
Cell: 082 880 7192

PLEASE VISIT MY WEBSITE FOR DETAILED INFORMATION ON THESE COURSES

SELF STUDY ONLINE WITH WEEKLY LIVE SESSIONS:

- Weekly sessions, held on zoom, include the summary of a particular topic and illustration on how the calculations are applied. If you are unable to attend the live sessions, the recording will be available on the learning platform.
- Access to learning platform which includes content relevant to your studies.
- Note that the majority of the content can only be accessed online.
- Pre-recorded webinars, on the topics relevant to your module, is available to assist with your studies.
- Includes examples for self-assessment

REGISTRATION

Register on the www.synergialearning.co.za website, on the COURSES page

www.synergialearning.co.za
COURSES PAGE

Once registered, payment will be processed via payfast after which, you will receive your login details. To access your course, please access the "my account" on the same website.

Registration is open from **6 February 2023**. Please do note the dates of the availability of each module registered for.

TERMS AND CONDITIONS

NO REFUNDS ONCE REGISTERED

Copyright©: Copyright of any documents vests with Synergia Learning. No part of these documents may be reproduced in whole or in part, used for commercial gain or disclosed or transmitted in any form whatsoever, without the prior written consent of the copyright owner, and to do so will be unlawful.

INVESTMENT	FEES INCL VAT
MODULES	
REEN1700: REGULATORY ENVIRONMENT	R2 800.00
ADDE: ADMIN OF DECEASED ESTATE	R2 800.00
EPDW: ESTATE PLANNING AND WILLS	R2 800.00
TRAD1700: TRUST ADMINISTRATION	R2 800.00
MOCK EXAM AND GUIDELINE SUMMARIES: PER MODULE	R1 100.00

INVESTMENT	FEES INCL VAT
DISCOUNTED PACKAGES	
ALL 4 MODULES ARE REGISTERED AND PAID FOR UPFRONT	R10 000.00
ALL 4 MODULE MOCK EXAM AND GUIDELINE SUMMARIES AND PAID FOR UPFRONT	R3 300.00

REGISTER FOR EACH LIVE SESSION SEPERATELY ACCORDING TO YOUR NEEDS.	FEES INCL VAT
EACH SESSION THE SESSIONS ARE EXAMPLES BASED FOR BETTER UNDERSTANDING AND APPLICATION.	R460.00
EXAMPLES DISCUSSED ON THE DAY WILL BE DISTRIBUTED.	

Cell: 082 880 7192

1231 Frances Avenue | Ramsgate | KwaZulu Natal 4285

carmen@synergialearning.co.za | www.synergialearning.co.za

E D U C A T I N G O U R F U T U R E P R O F E S S I O N A L S

THE SESSIONS INDICATED BELOW ARE SESSIONS THAT YOU SHOULD ATTEND. THE SESSIONS ARE HELD ON ZOOM. INVITES, INCLUDING THE LINK TO THE SESSIONS, ARE SENT CLOSER TO THE TIME.

REEN: REGULATORY ENVIRONMENT		COURSE AVAILABILITY	OPENS 1 MARCH CLOSES 29 AUGUST
DAY	DATE	TIME	UNITS COVERED MAY BE SUBJECT TO CHANGE
MONDAY	06 March	6PM – 9PM	UNIT 1 – 3.2
	13 March		UNIT 3.3 – 3.5
	20 March		UNIT 3.6
	27 March		UNIT 3.7 – 3.10

ADDE: ADMIN OF DECEASED ESTATES		COURSE AVAILABILITY	OPENS 1 APRIL CLOSES 1 SEPTEMBER
DAY	DATE	TIME	UNITS COVERED MAY BE SUBJECT TO CHANGE
MONDAY	03 April	6PM – 9PM	UNIT 1 – 2
	17 April		UNIT 3
	24 April		UNIT 4
	8 May		UNIT 5

EPDW: ESTATE PLANNING AND WILLS		COURSE AVAILABILITY	OPENS 1 APRIL CLOSES 30 AUGUST
DAY	DATE	TIME	UNITS COVERED MAY BE SUBJECT TO CHANGE
MONDAY	15 May	6PM – 9PM	SEC A UNIT 1 – 4
	22 May		SEC A UNIT 5 – 6
	29 May		SEC B UNIT 1 – 6
	05 June		SEC B UNIT 7 – 12

TRAD: TRUST ADMINISTRATION		COURSE AVAILABILITY	OPENS 1 APRIL CLOSES 6 SEPTEMBER
DAY	DATE	TIME	UNITS COVERED MAY BE SUBJECT TO CHANGE
MONDAY	12 June	6PM – 9PM	UNIT 1 – 2
	19 June		UNIT 1 – 3
	26 June		UNIT 3 – 4
	03 July		UNIT 3 – 4

REFRESHER: LIVE SESSIONS AND GUIDELINE SUMMARIES		These are bonus live sessions for students who are registered on the program. Students not registered on the program can register for these sessions separately.	
DAY	DATE	TIME	UNITS COVERED MAY BE SUBJECT TO CHANGE
MONDAY	10 July	6PM – 9PM	REEN
	17 July		ADDE
	24 July		EPDW
	31 July		TRAD

REGISTER FOR LIVE SESSIONS ONLY, ACCORDING TO YOUR NEEDS.	
An alternative option to the online studies made available	
Register for any live session that is held in any of the 4 modules.	COST OF EACH LIVE SESSION: R460 INCL VAT
This will include examples that will be discussed but, will not include the recording or, access to the online platform.	

MOCK EXAMS AND GUIDELINE SUMMARIES		COURSE AVAILABILITY	OPENS 1 JULY CLOSES 29 AUGUST
REGISTRATION OPEN 15 JUNE			
THESE ARE ONLINE EXAMS IN MULTIPLE CHOICE FORMAT.			
YOU WILL BE TESTED ON THE FOCUS POINTS AS HIGHLIGHTED IN THE EXAM GUIDELINES AS WELL AS GENERAL KNOWLEDGE.			

TO REGISTER FOR THE COURSES:

www.synergialearning.co.za
COURSES PAGE