

CARMEN VENTER



2023 POST-GRAD DIPLOMA IN FINANCIAL PLANNING 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 POST-GRAD DIPLOMA IN FINANCIAL PLANNING 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

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INVESTMENT	FEES INCL VAT
MODULES	
LFPE: ENVIRONMENT	R3 300.00
LFPP: PERSONAL	R3 600.00
LFPC: CORPORATE	R3 300.00
LFPS: CASE STUDY	R3 600.00
GUIDELINES/MOCK EXAMS	
EXAM GUIDELINES AND MOCK EXAMS PER MODULE	R1 100.00

INVESTMENT	FEES INCL VAT
DISCOUNTED COMBINATIONS:	
IF ALL 4 MODULES ARE REGISTERED AND PAID FOR UPFRONT	R12 500.00
IF ALL 4 EXAM GUIDELINE AND MOCK EXAM MODULES ARE REGISTERED AND PAID FOR UPFRONT	R4 000.00

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.	

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1231 Frances Avenue | Ramsgate | KwaZulu Natal 4285

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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.

LFPE: ENVIRONMENT		COURSE AVAILABILITY	OPENS 6 MARCH CLOSES 29 AUGUST
DAY	DATE	TIME	TOPICS DISCUSSED
THURSDAY	16 March	6PM – 9PM	TVM BASIC
	23 March		TVM ADVANCED
	30 March		INCOME TAX
WEDNESDAY	05 April		CAPITAL GAIN TAX
THURSDAY	13 April		LUMP SUM TAX
THURSDAY	20 April		ESTATE DUTY
WEDNESDAY	25 April		LEGISLATION SUMMARY
PRE-RECORDED WEBINARS ONLY:			COMPLIANCE + ECONOMICS AND FINANCIAL MANAGEMENT

LFPP: PERSONAL		COURSE AVAILABILITY	OPENS 6 MARCH CLOSES 31 AUGUST
DAY	DATE	TIME	TOPICS DISCUSSED
WEDNESDAY	5 April	6PM – 9PM	CAPITAL GAIN TAX
THURSDAY	13 April		LUMP SUM TAX
	20 April		ESTATE DUTY
	04 May		INVESTMENT PLANNING
	11 May		RETIREMENT PLANNING
WEDNESDAY	17 May		ESTATE PLANNING
THURSDAY	02 June		CALCULATIONS ON LFPP TOPICS
	17 June		BUSINESS ASSURANCE
PRE-RECORDED WEBINARS ONLY:			LONG AND SHORT TERM LEGISLATION

LFPC: CORPORATE		COURSE AVAILABILITY	OPENS 6 MARCH CLOSES 5 SEPTEMBER
DAY	DATE	TIME	TOPICS DISCUSSED
THURSDAY	13 April	6PM – 9PM	LUMP SUM TAX
	20 April		ESTATE DUTY
	01 June		EMPLOYEE BENEFITS
	08 June		BUSINESS ASSURANCE
	22 June		BUSINESS ENTITIES & TAX 1
	29 June		HEALTH BENEFITS
	06 July		APPLICATION OF TOPICS
	PRE-RECORDED WEBINARS ONLY:		

LFPS CASE STUDY		COURSE AVAILABILITY	OPENS 12 MARCH CLOSES 7 SEPTEMBER
DAY	DATE	TIME	TOPICS DISCUSSED
THURSDAY	13 July	6PM – 9PM	CASE STUDY 1 DISCUSSION
	20 July		CASE STUDY 2 DISCUSSION
WEDNESDAY	26 July		CASE STUDY 3 DISCUSSION
THURSDAY	18 August		CASE STUDY 4 DISCUSSION
	31 August		CASE STUDY 5 DISCUSSION
ALL MEMORANDUM FOR ABOVE AVAILABLE ONLINE			
PRE-RECORDED WEBINARS ONLY:			CASE STUDY APPROACH AND TECHNIQUE, CASE STUDY 1 -5 HOW TO ANALYSE FACTS

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.

This will include examples that will be discussed but, will not include the recording or, access to the online platform.

For Case study, memorandum will only be available for students who have registered on the online programme.

COST OF EACH LIVE SESSION:

**R460
INCL VAT**

MOCK EXAMS AND GUIDELINES WHEN RELEASED.

COURSE AVAILABILITY

1 JULY TO 7 SEPTEMBER

R950 (INCL VAT)

REGISTRATION AVAILABLE 15 FEBRUARY 2023

TO REGISTER FOR THE COURSES:

www.synergialearning.co.za
COURSES PAGE