

UFS's School of Financial Planning Law advancing financial planning education

As individuals, we need to set attainable goals and we need a step-by-step plan to help us achieve these goals and we also achieve more success if we have someone with the relevant knowledge and skills helping us and motivating us during this process

Most of us make New Year's resolutions and, even if we don't publicly publish it on Facebook, we feel compelled to say we're going to be better in the new year. We will start exercising, we will lose those extra 5 kgs, we will save more and pay off our debt.

However, it's a proven fact that few people stick to these resolutions and the reason is simple: We're planning to achieve a life goal without having a plan of action in place, and that lack of structure makes a seemingly simple task an unattainable goal.

The same can be said when you have to plan for death, disability and retirement. We all know it is a need that we have to address and we will all agree that it should take priority, but there is a definite gap between the knowing and the actual doing. A step-by-step plan and the assistance of someone with the relevant knowledge and skills to motivate us during this process can help to achieve success.

A Financial Planner, like a personal trainer, will evaluate in terms of your current level of financial "fitness" and will work out a step-by-step plan in order for you to achieve your personal financial goals and objectives. They will stand by you through market fluctuations and surprising election results. A good financial planner will motivate you and assist you in achieving financial soundness through careful planning, as

well as to adapt that plan to your individual needs and circumstances.

Being a good Financial Planner doesn't happen overnight. It takes years of training to be able to draft a holistic financial plan that is relevant, attainable and that will guarantee good results. Financial planning is about identifying a client's needs and goals and building a holistic, lifelong plan to address those needs.

For the past 15 years, the University of the Free State's School of Financial Planning Law has been at the forefront of educating Financial Planners who are trained to meet the unique needs of each client. The quality of their programmes (together with its trainers, who are leaders in the financial planning field), ensures that the school will continue to be the choice of large companies, banks, insurers and investment managers when it comes to training their staff to become leading Financial Planners who will become the solution to your and my money matters.

The SFPL offers programmes to deliver some of this country's best Financial Planning professionals.

The number of winners and finalists for the financial planning industry's most prestigious award—the FPI Financial Planner of the Year Award—who are alumni's of the School of Financial Planning Law is a testament to this.

The SFPL offers postgraduate education for persons who wish to attain the CFP® Professional status on successful completion of the Postgraduate Diploma in Financial Planning, specialise in specific aspects of Financial Planning with one of four specialised Postgraduate Diplomas in Financial Planning or who want the unique opportunity to attain the necessary academic qualification and skills to become fiduciary practitioners endorsed by the Fiduciary Institute of South Africa (FISA) on completion of the Advances Diploma on Estate and Trust Administration. ■

