ADVERTORIAL

A holistic, lifelong plan

Invest in your career as a financial planner

Financial planning is the profession of identifying the needs and goals of clients and building a holistic and lifelong plan to address those needs to achieve the financial goals of the client.

It deals with all the aspects of ensuring that financial matters are well managed on a month-to-month basis – thus making sure that clients have sufficient cash flow to meet financial obligations. It specifically focuses on long-term planning, such as ensuring enough funds for retirement, estate planning, and any other aspects around financial planning for the client and their loved ones. Financial planning also looks at the manner in which businesses are structured and the continuity of business interests within a corporate structure.

Financial planning has evolved over the years from salesman to advisor to trusted planner and has become a highly regulated profession with the focus being predominantly on technical, technological and product advances. However, the world is rapidly changing and what worked up until now will not necessarily work in the future.

The School of Financial Planning Law (SFPL) in the Faculty of Law at the University of the Free State prides itself on its qualities of excellence and integrity in providing holistic financial planning education since 2001. The school is educating financial planners who are theoretically and practically trained to meet the unique needs of each client through postgraduate and undergraduate programmes.

The Advanced Diploma in Estate and Trust Administration offers students the unique opportunity to acquire the necessary academic qualification and skills to become fiduciary practitioners. This is the only qualification that is currently endorsed by the Fiduciary Institute of Southern Africa (FISA) as the academic requirement in the process to be awarded the Fiduciary Practitioner of South Africa® (FPSA®) designation. Rising above the rest, UFS is not only proud to be the first South African accredited education partner of STEP, but to also be one of the only three universities globally with this accreditation. The Diploma puts graduates on the road to become full members of this global professional association as Trust and Estate Practitioners (TEP).

The South African public is always being encouraged to plan for the future in the form of investments. Different kinds of investments exist, and it is up to the individual to make the right decisions on the types of investments relevant to their purpose. The Postgraduate Diploma in Investment Planning provides individuals with the necessary academic qualification and skills to become experts in the field of investment planning, who will be able to provide leadership and expert advice within a multitude of financial and legal contexts.

The UFS Postgraduate Diploma in Estate Planning provides students with an academic qualification and the necessary skills to become experts in the field of estate planning. This programme intends to deliver practitioners who can act ethically and professionally, think analytically, communicate with relevant role-players in the industry, interact effectively with members of the public and evaluate and apply relevant information in legislation, literature and secondary data sources to specific practical scenarios.

Applications are open for all SFPL programmes. For more information, contact the School via email on SFPL_Appl@ufs.ac.za or visit the www.ufs.ac.za/sfpl