

students every year. This comprehensive programme equips aspiring financial advisors with the knowledge and skills necessary to navigate the complex world of financial planning. Structured around the CFP® curriculum, it delves into areas like risk management, retirement planning, tax optimisation and estate planning and will soon include behavioural finance.

The SFPL also offers specialised postgraduate diplomas in Estate Planning and Investment Planning. These programmes cater to individuals seeking in-depth knowledge in specific financial areas.

On the undergraduate level, the Advanced Diploma in Estate and Trust Administration is experiencing a surge in popularity as it equips individuals with the expertise to handle complex fiduciary matters.

At what NQF level are the various courses?

The Postgraduate Diplomas in Financial Planning, Estate Planning and Investment Planning are all on NQF level 8. The Advanced Diploma in Estate and Trust Administration is an undergraduate qualification on NQF level 7.

Do you have some students who are already financial planners and are looking to add to their qualifications in specific areas?

The SFPL understands the needs of working professionals in the financial industry. With approximately 99% of our students employed, our programmes are specifically designed for distance learning. This ensures that students can gain valuable financial planning expertise without compromising their current work schedule or family commitments.

The SFPL offers not just accredited qualifications but also assists students in focused professional development. Alongside our acclaimed postgraduate diplomas, the SFPL offers industry-relevant short courses designed to enhance a student's existing skillset.

Whether someone is looking to delve into the world of financial coaching or gain expertise in employee benefits, the SFPL's short courses provide individuals with the knowledge and practical skills needed to excel. These focused programmes are perfect for busy professionals, complementing their current qualifications and allowing them to specialise.

The flexible nature of these short courses, delivered online, ensures minimal disruption to work schedules. This makes them ideal for continuous learning and keeping expertise at the forefront of the ever-evolving financial landscape.

The Advanced Diploma in Estate and Trust Administration is accredited by two organisations. Tell us more about it.

The Advanced Diploma in Estate and Trust Administration is offered by the SFPL, the only institution in South Africa that is accredited with two well-respected organisations:

The Fiduciary Institute of Southern Africa (FISA): This is a non-profit organisation that focuses on fiduciary practitioners such as estate planners and trust administrators. FISA sets standards for the profession, provides education for consumers and offers

continuing professional development for its members. This accreditation signifies that the programme meets the educational requirements for achieving the prestigious FPSA® (Fiduciary Practitioner of South Africa) designation.

Society of Trust and Estate Practitioners (STEP): STEP is a global professional association dedicated to upholding high standards in the trust and estate management profession. It focuses on educating and maintaining rigorous professional qualifications for members. The Advanced Diploma in Estate and Trust Administration is *the only* qualification in South Africa that is considered sufficient as the education portion to become a STEP member. The SFPL is very proud of this achievement to be the only education provider in South Africa. STEP is recognised internationally as experts in estate and trust administration. This designation grants access to a global network of over 20 000 professionals.

What are notable achievements by the SFPL in the last couple of years?

The SFPL has a track record of excellence, boasting several notable achievements in recent years:

- **Top performers:** SFPL alumni consistently rank among the top five achievers in the FPI Board exam, year after year. This impressive record demonstrates the effectiveness of the SFPL's curriculum in preparing students for success.
- **Award-winning professionals:** For several years running, SFPL graduates have claimed the prestigious FPI Financial Planner of the Year award. This recognition highlights the exceptional skills and ethical practices instilled in SFPL alumni, solidifying their reputation as leaders in the field.
- **National recognition:** The Advanced Diploma in Estate and Trust Administration is the only qualification that FISA recognises as the academic requirement for attaining the FPSA® designation.
- **International recognition:** The SFPL offers the only accredited qualification in South Africa that allows graduates to become international STEP members. This unique qualification positions SFPL graduates for success in international estate planning.
- **Pioneering research:** SFPL academics are at the forefront of financial planning research. Their groundbreaking publication, *Perspectives in Financial Therapy*, is the first of its kind in South Africa, exploring the intersection of financial planning and emotional well-being and demonstrating the School's commitment to a holistic approach to financial guidance.

These achievements showcase the SFPL's dedication to excellence in financial planning education. By producing top-performing graduates, award-winning professionals and contributing to groundbreaking research, the SFPL continues to shape the future of financial planning in South Africa. 

