



CPD and Class of Business TRAINING

ADMISSION APPLICATION 2019
COMPLI-SERVE SA (Pty) Ltd

Please submit completed application to cob@milpark.ac.za

PERSONAL PARTICULARS:

* Required by the SA Dept. of Education

Surname

 Gender* _____

First names

 Race* _____

Maiden name

 Language* _____

Passport #

 Date of Birth

Nationality

 Country of domicile _____

E-mail address (Compulsory) _____ Highest Qualification* _____

Contact (Work) Code & No.

 (Home) Code & No.

(Fax) Code & No.

 Mobile (compulsory)

Full Physical Work Address:

 Full Postal Address:

City

 Code

 City

 Code

ONLINE SHORT COURSE: CPD and Class of Business TRAINING – Distance Learning Online (DLO)

Please register me for the following **COB** online short course/s (✓):

The discounted cost for each COB course is **R237.50**, which includes online study material

Short-term Insurance: Personal Lines	STIPL1-OS	<input type="checkbox"/>	Structured Deposits	STDEP1-OS	<input type="checkbox"/>
Short-term Insurance: Commercial Lines	STICL1-OS	<input type="checkbox"/>	Forex Investments	FORIN1-OS	<input type="checkbox"/>
Long-term Insurance	LTINS1-OS	<input type="checkbox"/>	Investments	INVES1-OS	<input type="checkbox"/>
Pension Fund Benefits	PFBEN1-OS	<input type="checkbox"/>	Health Service Benefits	HSBEN1-OS	<input type="checkbox"/>
Short-term and Long-term Deposits	STLTD1-OS	<input type="checkbox"/>			

Please register me for the following **CPD** online short course/s:

The cost of each CPD course is **R237.50 per 2hrs and R712.50 per 6hrs**, which includes online study material

CPD course name and code	Fee

PAYMENT PARTICULARS: Please attach your proof payment with this application

EFT BANK DEPOSIT

Milpark Education bank account:

Nedbank - Branch: Business Southern Peninsula
Branch code: 123209 / Account no: 1232 08 13 61

Reference: Surname and ID number

STUDENT DECLARATION:

I hereby certify that the information provided is correct and complete. I understand that false information will invalidate this application. Milpark Education collects, stores and uses personal information only for the purposes of administering student and prospective student admissions, registration, education and validation of qualifications. I consent to my personal information being disclosed to and used by Milpark and its authorised agents to validate my qualifications. Save as set out herein, the information collected is confidential and will not be disclosed to any third parties without your consent, except to meet government, legal and other regulatory authority requirements. I hereby consent to all applicable Class of Business (COB) study information being made available to my employer (if applicable), Compli-serve and to the Financial Services Conduct Authority. I waive my right to privacy for the purposes of my employer obtaining such information, using it for internal purposes and/or communicating to the Financial Services Conduct Authority.

Signature:

Date:

Course Name	Course Code	Duration
Administration of Deceased Estates	ADMDE1-OS	6 hours
Advanced Employee Benefits and Tax	AEMBT1-OS	6 hours
Consequences of Non-Disclosure	CONND1-OS	2 hours
Constructing a Client Portfolio	CCPOR1-OS	2 hours
Cultural Diversity in Financial Planning	CDFPL1-OS	2 hours
Disability Cover	DISCO1-OS	2 hours
Divorce and Estate Planning	DESTP1-OS	2 hours
Divorce and Retirement Fund Benefits	DRFBE1-OS	2 hours
Drafting an Estate Plan	DREPL1-OS*	6 hours
Employee Benefits and Client Engagements	EBCEN1-OS	2 hours
Employee Benefits and Dispute Resolution	EBDRE1-OS	2 hours
Employee Benefits and Tax	EMBET1-OS	2 hours
Employee Benefits: Risk and Structuring of Risk Benefits	EMBEN1-OS	2 hours
Estate Planning: Succession Planning for Businesses	ESPBU1-OS	2 hours
Ethical Investments	EINVE1-OS	2 hours
Ethics for Financial Planners	ECAFP1-OS	2 hours
FICA: Annual update	FICAU1-OS	6 hours
Fundamentals of Business Interruption Insurance	FBIINS1-OS	2 hours
Global Investment Strategies	GISTR1-OS	2 hours
Health Services Benefits	HESBN1-OS	6 hours
Investment Planning	INPLA1-OS	6 hours
Investment Planning and the Economy	IPECO1-OS	2 hours
Investment Planning for Business Owners	IPLBU1-OS	2 hours
Investment Planning Products	IPLFP1-OS	6 hours
King IV and Retirement Funds	KREFU1-OS	2 hours
Law Impacting on Estate Planning and Trusts	EPTLA1-OS	6 hours
Managing Risk in a Client's Portfolio	MRCPO1-OS	2 hours
Marital Regimes	MARRE1-OS	2 hours
Medical Scheme Performance	MEDPE1-OS	2 hours
Offshore Investments and Governance	OINVG1-OS	2 hours
Ombud's Cases and Ethical Considerations	OCAEC1-OS	2 hours
Overview of Changes in the Financial Planning Environment	OCEFPE1-OS	2 hours
Personal Financial Planning	PERFP1-OS*	6 hours
Pension Fund Regulations	PFREG1-OS	2 hours
Post-Retirement Planning	PORPL1-OS	2 hours
Practice Management	PMANA1-OS	6 hours
Pre-Retirement Planning	PRPLA1-OS	2 hours
Presentation Skills for Financial Planners	PREFP1-OS	2 hours
Regulation 28 In-fund Investment Management	28IFI1-OS	2 hours
Report Writing for Financial Planners	RWFPL1-OS	2 hours
Retirement Fund Governance	RFGOV1-OS	2 hours
Retirement Funds and Risk Management	RFRMA1-OS	2 hours
Retirement Planning: Lump-Sum Tax at Retirement	RPTAR1-OS	2 hours
Retirement Planning: Tax on Death	RPTAD1-OS	2 hours
Retirement Planning: Tax on Withdrawal	RPTOW1-OS	2 hours
Risk and Business Assurance	RBINS1-OS	6 hours
Risk Management Considerations for a Financial Planning Practice	RMCFPP1-OS	2 hours
Risk Planning Products	RPPRO1-OS	6 hours
Risk Planning: Understanding the Risk Planning Process	RPLMA1-OS	2 hours
Section 14 Transfers: Process and Pitfalls	S14PP1-OS	2 hours
Section 37C Disposal of Death Benefits	37CDB1-OS	2 hours
Shari'ah Compliant Estate Planning	SHSEP1-OS	2 hours
Short-term Insurance	STINS1-OS	6 hours
Social Security and Retirement Reform	SSRRE1-OS*	2 hours
Social Media Use	SMEDU1-OS	6 hours
Social Media Use for Key Individuals	SMUKI1-OS	2 hours
Social Media Use for Financial Planners	SMUFP1-OS	2 hours
Tax and Investments	ITAXI1-OS	2 hours

Course Name	Course Code	Duration
Tax and Retirement Funds	TACRF1-OS	6 hours
Taxation Applicable to Estate Planning and Trusts	TAEPT1-OS	6 hours
Tax Benefits of Retirement Planning	TBRPL1-OS	2 hours
Tax Deductions of Retirement Fund Contributions	TDRFC1-OS	2 hours
Tax-Free Savings Accounts in Financial Planning	TSAFP1-OS	2 hours
Tax Planning for Businesses	TPLBU1-OS	2 hours
The Investor and Investment Planning Fundamentals	IIPFDS1-OS	6 hours
The Regulatory Requirements for Replacements	RRREP1-OS	2 hours
Trusts and Estate Planning	TEPLA1-OS	2 hours
Umbrella Funds Options, including Costing	UFOCO1-OS	2 hours

* Modules that are currently in development.