

CASE STUDY PROGRAMME FOR THE CFP® EXAMINATIONS



Carmen Venter

PO Box 6571
Westgate
1734

Office: 011 026 9409
Cell: 082 880 7192
Fax: 086 276 0658
carmenventer@discoverymail.co.za
www.futurefinance.co.za

Workshop approach and content

In my own studies with fellow students, I noticed that difficulty in applying theory and principles was the main issue. I am regularly approached by students and colleagues for assistance and have been quite successful in demonstrating not only how to apply our studies but also demonstrate where and how it all fits together.

My Workshops were launched in 2007 at the request of many students who felt that a different approach to the lectures/seminars that are available, was needed.

My Workshops are more focused on the application of our studies as well as, working through past exam papers and mock exams (as closely aligned to the exam guidelines as possible) in a 'exam like' environment.

This approach allows you to practice, understand how to interpret exam questions, giving you an idea of your time management and level of knowledge all of which, leads to exam preparation earlier in the year rather than later.

In the first year of presenting this methodology, I had already obtained a 75% pass rate (September exams only) and many distinctions!

Since 2007 this workshop has produced top students and many distinctions! If you are wanting referrals – please do let me know and I will oblige.

Due to the hands on approach of the workshops, only 40 students per module can be accommodated – so book early to avoid disappointment! No additional classes will be made available in 2017.

If you are not:

- reasonably comfortable with your knowledge,
- great at self discipline
- willing to make the effort to work through the papers yourself

then this programme is not for you.

Please enquire about the weekly workshops that are available.

Content:

- This programme is aimed at students who require only to complete the case study exam and, who are comfortable with their knowledge.
- The programme will cover the full curriculum needed to be successful in the exams and focuses mainly on analysing, synthesising and application.
- It is important that you are comfortable with your knowledge as well as researching any new legislation updates and case law.
- The first session will cover all legislation changes that you require to go forward.
- Thereafter, the programme focuses on case study papers issued to you, to be completed before the next session.
- The session following is an opportunity for the student to discuss and debate the facilitators solutions and application.

Presenter:

Carmen Venter – has been in the Insurance & Financial Industry since 1981 becoming a Financial Advisor in 1998. She has obtained an HDIP Tax (RAU) in 2004 and completed her Post Grad Dip in Financial Planning (UFS) in 2007. Carmen also successfully completed in 2011 a Post Grad Dip in Tax (Cum) with UFS obtaining 10 distinctions. She is registered with the FSB and Medical Council. Is a CFP® Professional Member of the FPI, a Master Member with the SA Institute of Tax Professionals and a Fiduciary Planner of SA.

**ANY OTHER GUEST SPEAKERS WILL
BE ANNOUNCED AT THE TIME**

Dates, Times and Venues

VENUE	SATURDAYS Stonemill Office Park, Waterstone House 300 Acacia Road, Darrenwood (opposite Cresta Shopping Centre)
TIMES:	13h15 – 16h30
SEAT LIMITS:	40 students each module per group

Detailed Schedule for 2016

MONTH	SAT	TOPIC
MARCH	11TH	LEGISLATION UPDATE AND ISSUE OF CASE STUDY 1
APRIL	8TH	CS 1 SOLUTIONS AND ISSUE OF CASE STUDY 2 AND 3
MAY	27TH	CS 2 AND 3 SOLUTIONS AND ISSUE OF CASE STUDY 4
JUNE	24TH	CS 4 SOLUTIONS AND ISSUE OF CASE STUDY 5
JULY	29TH	CS 5 SOLUTIONS AND ISSUE OF CASE STUDY 6
AUG	19TH	CS 6 SOLUTIONS AND ISSUE OF CASE STUDY 7
AUG	26TH	CS 7 SOLUTIONS
SEPT	TBA	EXAM GUIDELINES AND REVISION

Note: OTHER SESSIONS MAY FORM PART OF THE PROGRAMME AND DATE DECIDED ONCE EXAM GUIDELINES HAVE BEEN ISSUED.

FAIS/FICA
INVESTMENT 3 – ANALYSES/ASSET ALLOCATION ETC
ENVIRONMENT GUIDELINES
PERSONAL GUIDELINES

CORPORATE GUIDELINES
CASE STUDY GUIDELINES ARE ISSUED EARLY IN THE YEAR AND WILL ALREADY BE INCORPORATED IN THE 5 CASE STUDIES ABOVE - SO NO ADDITIONAL UNLESS NEEDED.



CARMEN VENTER
CFP® EXAMINATIONS 2017

REGISTRATION FORM – CASE STUDY PROGRAMME

Name:
Surname:
Identity Number:
Occupation:
Previous experience/education:
Are you repeating any modules?
Please share with me your areas of concern:
Postal Address:
Business contact:
Cell Number:
Email address for general communication:
Alternative email address:
Fax Number:
Student Number:
Signature:
Date signed:

carmenventer@discoverymail.co.za
Tel: 082 8807192/011 026 9409
Fax: 086 276 0658

Case Study: (VAT incl)	Cost
Total Payable: (VAT incl)	R10 260.00

Payment:
Eft payments to be made to C Venter:
Standard Bank, Braamfontein Branch Code 004805
Cheque Account number: 200379429

Method of Payment (please tick ✓)		
Please include	Eft	Cash

PAYMENT REQUIRED FOR RESERVATION OF SEAT.

Terms and Conditions

To secure your booking:
Please ensure that payment is made by no later than 10th February unless otherwise arranged and agreed upon. If no payment is received or arrangement made before then, your seat will be allocated to the next student on the waiting list and printed material for your module will not be distributed.

Deferred payment arrangement:
3 months deferred payment can be arranged if 2 or more modules are registered for. This arrangement has to be approved by Carmen Venter and students are requested to adhere and not modify the arrangement as they see fit. The 1st payment will be due on the 10th February to secure booking. You agree not to default on any outstanding payments if you decide to quit the programme/cancel your studies for any reason other than for medical reasons or emigration. Material will be delivered only for the module/session paid for.

Cancellations
Unless another student takes over your booking – no refunds. If refunds are agreed to, this will be done proportionately.

I hereby agree to the above terms and conditions:

Signed at _____ on this day _____ 2017

Student Signature