

FACE-TO-FACE LECTURES

FOR STUDENTS OF THE 2017 POST GRADUATE
DIPLOMA IN FINANCIAL PLANNING AND THE
CFP® PROFESSIONAL COMPETENCY EXAMINATION

WHAT TO EXPECT

Our efficient and effective study materials and lectures will guide you through all the theory and calculations at the level you will be required to know in your exams. Our method incorporates abundant practical examples in addition to past examination questions and a detailed investigation of the examination guidelines provided by the University. Our high quality, comprehensive notes will help you master all the required material and will navigate you through your prescribed reference work: The South African Financial Planning Handbook. You will also become part of a stimulating learning environment and have meaningful interaction and networking with like-minded highly motivated fellow students.

Paul Rabenowitz AIF®, CFP®, CIPM, FPSA®, GFS™, M.Inst.D, MIFM, RFT™

Postgraduate Diploma in Financial Planning, Advanced Postgraduate Diploma in Financial Planning (Cum Laude), Certificate in Pension Funds Law, Certificate in Administration of Estates (Cum Laude), Certificate in Fiduciary Governance, Certificate in Advanced Corporate Law and Securities Law, Programme in Investment Analysis and Portfolio Management (Cum Laude), Programme in Financial Management (Cum Laude), Programme in Risk Management (Cum Laude).

Paul is the founder of Lightbulb Learning and Training, which specialises in education and training in the financial services industry. He is the managing editor of The South African Financial Planning Handbook, The Fundamentals of Financial Planning and the Preparatory Guide for the FAIS Level 1 Regulatory Exam.



COST

The cost is **R400** per lecture or **(R380** per lecture for students who pay up front or returning students who are completing the course over more than one year). Mock exams are **R800**.

REGISTRATION

Register today at
www.lightbulblearning.co.za

VENUE

Alexander Forbes – 115 West Street, Sandton (opposite Sandton Gautrain Station).

CONTACT DETAILS

Paul Rabenowitz 082 551 1322
paul@lightbulblearning.co.za
www.lightbulblearning.co.za

2017 Lecture Dates: Wednesday Evening and Saturday Morning

No.	Wednesday Evening	Saturday Morning	Topic	Subject
0	Wednesday 22 February		Orientation (17.00 – 18.30)	All
1	1 March	4 March	Quantitative methods 1: The time value of money and discounted cash flows	Environment Personal Case study
2	8 March	11 March	Quantitative methods 2: Needs analysis calculations	Environment Personal Case study
3	15 March	18 March	Tax 1: Income Tax	Environment Case Study
4	22 March	25 March	Tax 2: Capital Gains Tax	Environment Personal Case study
5	29 March	1st April	Tax 3: Donations Tax, Transfer Duty and Taxation of Lump Sum Benefits	All
6	5 April	8 April	Estate Planning 1: Marriage, Matrimonial Property and Family Law	Personal Case study
7	12 April		Estate Planning 2: The Law of Succession and Limited Rights	
8	19 April	22 April	Estate Planning 3: Estate Duty	
9	3 May	6 May	Estate Planning 4: The Law and Taxation of Trusts	
10	10 May	13 May	Estate Planning 5: Estate planning	
11	17 May	20 May	Retirement 1: The law of retirement funds	Personal Corporate Case study
12	24 May		Retirement 2: Individual retirement planning	Personal Case study
13	31 May	27 May	Investments 1: Statistical and investment return calculations	
14	7 June	10 June	Investments 2: Money markets and bonds	
15	14 June	17 June	Investments 3: Equities and Derivatives	
16	21 June	24 June	Investments 4: Portfolio management	
17	28 June		Investments 5: Investment Planning Process and Investment Vehicles	
18	5 July	1st July	Insurance Law	Corporate Case study
19	12 July	8 July	Business Insurance	
20	19 July		The Law and Taxation of Business Entities	
21	26 July	15 July	Healthcare	
22	2 August		Financial Statements	Corporate
23	10 August	22 July	Compliance 1: Compliance Law	Environment
24	16 August		Compliance 2: Ethics, contracts & delict and important case law	Environment
25	23 August	29 July	Case study 1: Principles and techniques of the case study and case studies	Case study
26	24 August		Case study 2: Case studies	
	5 August		Personal Financial Planning Mock Exam	
	12 August		Corporate Financial Planning Mock Exam	
	19 August		Case Study Mock Exam	
	26 August		Financial Planning Environment Mock Exam	

Wednesday evening lectures will be held from 17.00–20.00
Saturday morning lectures will be held from 09.00–12.00

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Dear Lightbulb Learner

I invite you all to a free orientation evening on **Wednesday, 22 February 2017** from 17.00–18.30 followed by snacks. This introductory session will provide invaluable assistance and information in preparing for your exciting year of learning ahead.

WHO SHOULD ATTEND?

All learners registered for any modules of the postgraduate diploma in financial planning.

WHY SHOULD YOU ATTEND?

This will provide you with a unique opportunity to delve into the scope and nature of the curriculum of the Post Graduate Diploma, learn study methods and techniques to help you make the most of the classes, to ask any questions and meet your fellow students for the year to start forming study groups.

VENUE

Alexander Forbes

115 West Street, Sandton
(opposite Sandton Gautrain Station).

There will be a lucky draw for two copies of the latest book published by LexisNexis: ***Fundamentals of Financial Planning***. LexisNexis will have a stand with information and details on all relevant financial planning books for your practice and further study.

LexisNexis has kindly offered all Lightbulb Learners who attend a special discount on selected publications ordered at the orientation evening.



WHAT SOME OF OUR PREVIOUS STUDENTS HAVE TO SAY

It gives me great pleasure to share my experience which I had with Paul Rabenowitz as my lecturer.

I have been involved in the financial service industry for 27 years. For the past 5 years a Wealth Adviser with PSG Wealth, specialising in Estate- and Wealth management.

Having a passion for our industry and continuous development, I decided to enrol for the Postgraduate Diploma in Financial Planning (CFP). Being an independent adviser with contracts with all the big role players in the industry I had the benefit of having access to a lot of training programmes these companies could offer.

Being very demanding and specific in my needs I decided on Lightbulb Learning after researching other intermediaries learning experiences.

I am extremely grateful to Paul for giving me such a fresh insight into the industry as a whole. Paul have an enviable ability to hold the attention of the class and his humorous approach made the whole learning experience so much more enjoyable. Paul has an excellent level of knowledge and were always able to provide his views and insight when presented with questions. The slides provided me with all I needed to study and simplified the learning process. Being an older student that is not used to an overload of learning material, I am sure I would not have been able to pass all my exams first time, two with distinctions, without these notes.

I would most certainly recommend Paul as lecturer.

Dulcie Weyks – FSA™
Wealth Adviser.

Paul made a great effort to keep everybody involved and his preparation was excellent. He has a talent of making difficult topics understandable and manageable. Thank you so much to the Lightbulb team! My marks improved substantially throughout the year thanks to Paul's notes and the mock exams. I would definitely recommend these lessons to anyone studying towards their CFP designation.

Simone Sharman – BComm Hons
Faerie Glen Stockbroking and Financial Planning. Financial Adviser.

WHAT SOME OF OUR PREVIOUS STUDENTS HAVE TO SAY

Paul Rabenowitz states – *Lightbulb Learning and Training is an industry leader in training financial planners.* I can testify to it.

I registered for the 2016 training programme Postgraduate Diploma in Financial Planning. Being a practising attorney with 26 years experience I was excited to extend my field of expertise to include financial planning, but with a BLC LLB (cum laude) obtained in 1987, with no studies thereafter and with no academic qualification in the field of commerce or tax I was soon to discover a foreign world of information which seemed impossible to master and definitely not meant for the feint hearted.

I despondently decided after attending Paul's second lecture that I would be better off completing the Diploma over two years rather than in one go from March to August but with Paul's calm support, superb patience and tough love encouragement I decided to plough forth. I began a journey that took over my life for six months but what an empowering experience!

The prescribed study guidelines that students are provided with, are just that, guidelines. I am convinced that I would never have successfully completed all four modules of the post graduate programme without attending Paul's lectures and studying his notes in addition to the guidelines and textbook.

Not only does Paul's programme provide -

- structure in your preparations for the exam by dividing the voluminous study material into manageable sections that logically follow in sequence and tie the theory in with the practice,
- encouragement and discipline to work methodically and within time constraints to ensure that you are well prepared for the exams,
- explanations of the inexplicable (calculations, statistics, income tax, investment strategies and philosophies) in a clear, correct, comprehensive and concise manner,
- understandable applications of legislation in a fun and easily memorable manner; and
- make sense of the Income Tax Act with all its Schedules,

but is also presented in a highly intelligent, furiously passionate and superbly witty way which is exciting, contagious and inspiring.

The theoretical knowledge is illustrated with up to date practical examples and case studies similar to the online weekly assignments that must be submitted for exam marks and as tested in the exam papers. The mock exam papers are comprehensive and I did not encounter one question in the final exam papers that I was not familiar with or well prepared for.

I followed Paul's instructions, notes and advice religiously and contribute my success to him.

Hannelie Basson

REGISTRATION FORM

SURNAME			
NAME			
ID NUMBER			
CELL NUMBER			
COMPANY			
EMAIL		CAR MAKE	
STUDENT NUMBER		CAR REG.	

INVOICE DETAILS

NAME OF COMPANY OR INDIVIDUAL TO BE INVOICED
PHYSICAL AND POSTAL ADDRESS
VAT NUMBER (IF APPLICABLE)
CONTACT NUMBERS
EMAIL ADDRESS

PLEASE INDICATE WHICH SUBJECTS AND ON WHICH DAY YOU WOULD LIKE TO ATTEND

SUBJECTS	WEDNESDAY (17.00–20.00)	SATURDAY (09.00–12.00)
Financial planning environment	<input type="checkbox"/>	<input type="checkbox"/>
Personal financial planning	<input type="checkbox"/>	<input type="checkbox"/>
Corporate financial planning	<input type="checkbox"/>	<input type="checkbox"/>
Case study	<input type="checkbox"/>	<input type="checkbox"/>

I hereby authorise Lightbulb Learning and Training to obtain my exam results once these become available, solely for the purposes of collecting statistics regarding student results.

PAYMENT OPTIONS

UP FRONT FOR ALL LECTURES ATTENDING FOR THE YEAR ☐ OR PER SESSION ☐

Payment can be made by the following methods: Credit Card • Electronic Funds Transfer • Direct Deposit • Cash payment at lecture venue

TERMS AND CONDITIONS

- All seminars and supplementary material are in English.
- No entrance to the seminars will be permitted without either proof of payment or payment on the day of the seminar.
- It is not permitted to record, tape or film the seminars.
- Smoking within the presentation auditorium is prohibited and may only be done in designated areas.
- We reserve the right, if necessary or unavoidable, to substitute a presenter at any seminar.
- We reserve the right to cancel a particular seminar or venue on account of insufficient support.
- Refunds: refunds will only be allowed subject to cancellation of remaining seminars. No refunds will be given for seminars simply not attended. The refund will be 90% of any remaining seminars as from official notice of cancellation. Any application for refunds after the end of the series of seminars will not be considered.
- Substitutions of participants at a particular seminar is not permitted.
- The notes are made available subject to the authors' copyright and granted to you to use them solely for your personal educational purposes and not to distribute them in any form.

Through submitting this registration form you acknowledge and accept these terms and conditions.

[CLICK TO SUBMIT VIA EMAIL](#)