

CENTRE FOR TEACHING AND LEARNING (CTL) RPL OFFICE

RPL FOR ADMISSION IN THE ADVANCED DIPLOMA IN ESTATE AND TRUST ADMINISTRATION

The Advanced Diploma in Estate and Trust Administration enables a person to obtain one of the highest academic and professional level of competency in the fiduciary services industry and to become eligible to obtain the registered professional designation of Fiduciary Practitioner of South Africa (FPSA®) as awarded by the Fiduciary Institute of Southern Africa (FISA). The Fiduciary Institute of Southern Africa (FISA) is the only professional body focusing solely on fiduciary practitioners in Southern Africa. FISA is a non-profit organisation that represents fiduciary practitioners and sets high minimum standards for the industry.

The Recognition of Prior Learning (RPL) Office and the School of Financial Planning Law at the UFS designed an alternative path for experienced individuals working in the fiduciary services environment to gain admission to the Advanced Diploma in Estate and Trust Administration.

RPL acknowledges that the competencies that an individual has acquired from formal, non-formal and informal learning and within the work context may be identified, assessed and considered to provide admission to formal qualifications. The purpose of the RPL process, in this regard, is to grant admission to the Advanced Diploma in Estate and Trust Administration and not to grant any credits towards a qualification.

TAKE NOTE:

- All candidates must be in possession of a Senior Certificate to apply for admission to the RPL process
- Work experience in areas of Fiduciary Services and the relevant dates that are applicable must be set out in detail on the application form and on the CV and the term will be considered as of date of application for RPL process.
- When reference is made to **relevant** qualifications or **relevant** areas of Fiduciary Services, it includes the following: Trust Administration and Drafting, Estate Administration, Drafting of Wills and Estate Planning.
- It is the candidates' responsibility to supply all the applicable documentation to motivate the application.

TABLE 1:

If a candidate meets any of the following requirements, they can qualify for the RPL process:

QUALIFICATION	NQF - LEVEL	EXPERIENCE IN ALL AREAS OF FIDUCIARY SERVICES	NUMBER OF YEARS EXPERIENCE IN ALL AREAS	EXPERIENCE IN 1 OR MORE AREAS OF FIDUCIARY SERVICES	NUMBER OF YEARS EXPERIENCE IN AN AREA	GROUP	STEPS APPLICABLE
Relevant	6	Yes	2+	NA	NA	A	1,2,3,4,7,8
Relevant	5	Yes	5+	NA	NA	A	1,2,3,4,7,8
Relevant	5	Yes	3+	NA	NA	B	1,2,3,4,6,7,8
Any	6	Yes	2+	NA	NA	B	1,2,3,4,6,7,8
Any	5	Yes	4+	NA	NA	B	1,2,3,4,6,7,8
Relevant	6	No	NA	Yes	2+	B	1,2,3,4,6,7,8
Relevant	5	No	NA	Yes	3+	B	1,2,3,4,6,7,8
Any	6	No	NA	Yes	3+	C	1,2,3,4,5,6,7,8
Any	5	No	NA	Yes	5+	C	1,2,3,4,5,6,7,8
Senior Certificate (Matric)	NA	Yes	7+	NA	NA	C	1,2,3,4,5,6,7,8

Should the candidate fall in any of the above categories, the applicable steps set out hereunder must be followed. The candidate will be informed of what steps will be expected from them and the relevant time lines.

STEP 1: Application: ALL RPL CANDIDATES

Only applications that contain all the required documents will be screened. Please make use of the official application form and include a complete letter of motivation.

Email the application form as well as the required documents to RPL@ufs.ac.za and cc RPLOffice@ufs.ac.za.

STEP 2: Screening: ALL RPL CANDIDATES

During this step the application form will be screened and it will be determined if a candidate meets all the requirements and in what group the candidate falls as to inform the candidate which of the remaining steps will be applicable to his/her RPL process.

STEP 3: Knowledge Test: ALL RPL CANDIDATES

Candidate will be expected to complete an online Knowledge Test and achieve a minimum mark of 65% in order to continue. If 65% is not achieved candidate will have to re-apply for admission to RPL on one of the alternative dates.

STEP 4: Admission to RPL: ALL RPL CANDIDATES

Should the knowledge test be completed successfully, admission to the RPL Programme is granted. Candidates will be informed of this in due time and will have to pay the administration fee.

STEP 5: Case Study: GROUP C

Candidates will be given all the relevant information in a set of facts. Candidates must apply their knowledge and skills in relevant areas of the fiduciary services industry to complete the case study satisfactorily.

STEP 6: Portfolio of Evidence: GROUP B & C

The completion of the portfolio of evidence will be explained in a broadcast and with an explanatory document. Candidates will be given a submission date for the portfolio. This portfolio and the case study is what the entire assessment is based on.

STEP 7: Assessment: ALL RPL CANDIDATES

The School of Financial Planning Law will assess all the material received from all the candidates to determine if the candidate successfully completed the RPL program.

STEP 8: Feedback to candidates

Candidates will be informed of the outcome and the steps to follow thereafter.

APPLICATION

Students are expected to complete and submit the application document as the first step in the RPL process. Please follow the instructions on the application form concisely and supply all the relevant documentation.

APPLICATION DATES FOR RPL CYCLE

There are 4 opportunities to apply for admission to the RPL program during 2021.

As soon as your application has been received, it will be screened to determine if you are a successful candidate for the RPL program. If you are a successful candidate you will receive a document that will supply you with all the additional information necessary to successfully complete the RPL process e.g. in what group you fall (Group A, B or C) and all the applicable dates will be.

The closing dates for the RPL process in 2021 will be:

12 March 2021 ; 21 May 2021 ; 23 July 2021 (Group A,B or C)

15 October 2020 (Group A or B).

If RPL is successful candidate will be able to register for the Diploma in 2022.

KNOWLEDGE TEST

This will be an online assessment. Candidates must score above 65 %. It will test candidate's working knowledge of all relevant areas of the Fiduciary services industry. It will be an open book assessment and a demarcation will be provided. On the relevant date the Candidate will be given access to an online platform where he/she will have to complete the knowledge test in a prescribed amount of time.

CASE STUDY

Once the screening and online assessment has been successfully completed it will be determined if a candidate will be allowed to progress to complete the case study in order to continue with the rest of the RPL process.

The process will be as follows:

A candidate will be given one date on which the case study will be written. Please note that there is only ONE date and thus candidates must ensure that they are able to comply with this date – no exceptions will be made.

On the given date, at 08h00, the case study will be emailed to the candidate. The candidate will complete the case study without any assistance from other individuals or making use of any computer programmes other than MS WORD. The candidate will have eight hours to complete the case study and will have to submit the case study via email to RPLOffice@ufs.a.c.za no later than 16h00 on the said date.

No late submissions will be accepted.

The case study will be marked and should a candidate receive 65% or more, the candidate will be allowed to continue with the RPL process.

Should a candidate receive less than 65% for the case study, the candidate will not be allowed to continue with the RPL process.

Case Study content

Candidates will be given all the relevant information in a set of facts. Candidates must apply their knowledge and skills in relevant areas of the fiduciary services industry to complete the case study satisfactorily.

Candidates will be expected to be able to:

1. Calculate the Estate duty of a client, this includes the capital gains tax at death, any accrual claims, executors fees and any limited interests such as fiduciary and usufruct calculations,
2. Apply and understand the law of trust and the administration of trust.
3. Drafting wills and be able to apply the law of succession and intestate succession.
4. Drafting and calculations of liquidation and distribution accounts.
5. Be able to calculate, explain and apply the relevant legislation to the process of the administration of a deceased estate.
6. Discuss case law in an effective manner.
7. Understand and apply all the regulatory environment in South Africa as applicable to the fiduciary services industry.

Candidates may not make use of any computer programmes or on line calculators. Candidates are expected to do the case study manually (the old fashioned way with a calculator). If it is found that a candidate made use of any electronic planning programme or pre populated excel sheets, the candidates will automatically fail the case study and will not be allowed to continue with the RPL process.

The prescribed calculator is the HP10bii. If you use another type of calculator and can operate it, you are welcome to use it. Just take note that support regarding other calculators will not be provided during the test or case study.

It is suggested that candidates prepare for the case study in the following manner:

- Make use of the calculator manual to do the basic calculations,
- Get the latest tax pocket guide from the internet and make sure that you are up to date with the latest tax information,
- Consult relevant textbooks on Estate Planning, Trust Administration, Wills drafting and Administration of Deceased estates.

PORTFOLIO OF EVIDENCE (POE)

The portfolio of evidence is an organised collection of documents in which **proof of evidence** and work examples of formal and other prior learning is provided. You will receive the portfolio as a MS-Word file to work on. The portfolio must be submitted by the date scheduled. The RPL Office will support you in compiling the Portfolio of Evidence (POE).

Candidates will be supplied with specific guidelines regarding the POE and must achieve 65% to be eligible for admission to the Advanced Diploma in Estate and Trust Administration.

ASSESSMENT

The Programme Director of the Advance Diploma in Estate and Trust Administration may give academic advice to candidates regarding the academic pathway. Based on the assessment result the assessor could make a recommendation regarding the number of modules a candidate may register for. This academic advice must be considered by the candidate in the registration process to ensure successful completion of the Advance Diploma in Estate and Trust Administration.

PAYMENT INSTRUCTIONS

PLEASE NOTE:

Neither cash nor cheques nor postal orders will accepted with the application form. Only electronic payments (are per below) will be accepted.

Keep your deposit slip as proof of payment. Send copy of proof of payment with your supporting documents. The application fee is not refundable, despite any outcome.

COSTS:

Application fee – R300

Please ensure that your reference includes the abbreviation “RPL” followed by your surname and initials.

Example:

Dep. reference	R	P	L	/	S	U	R	N	A	M	E	,	I	N	I	T	I	A	L	S
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BANKING DETAILS:

Refer to the application form for details.

Once students have been admitted to the RPL process an administration and assessment fee is payable. The RPL Office will provide you with an invoice.

GROUP A: R5 500.00

GROUP B: R6 500.00

GROUP C: R7 500.00

For any queries or assistance, please make use of the contact person:

Martie Meintjes: 051 401 7357: RPLOffice@ufs.ac.za

Andile Madiehe: 051 401 7326: RPL@ufs.ac.za

Please submit your application form as soon as possible and email the documents requested. If you have any further questions please contact us to assist you.

ALL THE BEST!