FACE-TO-FACE LECTURES

FOR STUDENTS OF THE 2019 **POST GRADUATE DIPLOMA IN FINANCIAL PLANNING** AND THE **CFP® PROFESSIONAL COMPETENCY EXAMINATION**

LightBulb LEARNING & TRAINING

from information to inspiration

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.

COST

The cost is **R400** per lecture. Mock exams are **R800**.

There is a 5% discount for upfront payments

REGISTRATION

Register today at www.lightbulblearning.co.za

VENUE

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

CONTACT:

Anelda Slabbert at support@lightbulblearning.co.za

www.lightbulblearning.co.za

PAUL RABENOWITZ AIF®, CFP®, CIPM, FIFM, FPSA®, GFS™, M.INST.D, RF™

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.

2019 WEDNESDAY EVENING 17:00–20:00 LECTURE SCHEDULE:

Date	Topic	Subject
20 February	Orientation	All
27 February	Quantitative methods 1: The time value of money and discounted cash flows	Environment Personal Case study
6 March	Quantitative methods 2: Needs analysis calculations	
13 March	Tax: Income Tax	Environment Case Study
20 March	Tax: Capital Gains Tax	Environment Personal Case study
27 March	Tax: Donations Tax, Transfer Duty and Taxation of Lump Sum Benefits	
3 April	Estate Planning: Marriage & Matrimonial Property and Family Law	
10 April	Estate Planning: The Law of Succession and Limited Rights	
24 April	Estate Planning: Estate Duty	
2 May (Thursday)	Estate Planning: Business Insurance	Corporate Case study
8 May	Estate Planning: Trusts: Law and Taxation	Environment Personal Case study
9 May (Thursday)	Estate Planning: Estate planning	Personal Case study
15 May	Investment Planning: Risk & return calculations	
22 May	Investment Planning: Money markets and bonds	
23 May (Thursday)	Investment Planning: Equities and Derivatives	
29 May	Investment Planning: Portfolio management	
5 June	Investment Planning: Investment Planning Process and Investment Vehicles	
12 June	Retirement Planning: The law of retirement funds	Personal Corporate Case Study
26 June	Retirement Planning: Individual retirement planning	
3 July	Insurance Law	Personal Case Study
17 July	Business Entities: Law and Taxation	Corporate
31 July	Business Valuation & Financial Statements	
7 August	Healthcare	
14 August	Compliance: Compliance & Ethics 1	Environment
15 August (Thursday)	Compliance: Compliance & Ethics 2	
21 August	Case study 1: Principles and techniques	Case Study
22 August (Thursday)	Case study 2: Case studies	

2019 SATURDAY MORNING 09:00–12:00 LECTURE SCHEDULE:

Date	Topic	Subject
Wednesday Evening 20 February	Orientation	All
2 March	Quantitative methods 1: The time value of money and discounted cash flows	Environment Personal Case study
9 March (Double Session)	Quantitative methods 2: Needs analysis calculations	
	Tax: Income Tax	Environment Case Study
16 March (Double Session)	Tax: Capital Gains Tax	Environment Personal Case study
	Tax: Donations Tax, Transfer Duty and Taxation of Lump Sum Benefits	
23 March (Double Session)	Estate Planning: Marriage & Matrimonial Property and Family Law	
	Estate Planning: The Law of Succession and Limited Rights	
30 March (Double Session)	Estate Planning: Estate Duty	
	Estate Planning: Business Insurance	Corporate Case study
6 April (Double Session)	Estate Planning: Trusts: law and Taxation	Environment Personal Case study
	Estate Planning: Estate planning	Personal Case study
13 April (Double Session)	Retirement Planning: The law of retirement funds	Personal Corporate Case Study
	Retirement Planning: Retirement planning	
4 May (Double Session)	Investment Planning: Risk & return calculations	Personal Case Study
	Investment Planning: Money markets and bonds	
11 May (Double Session)	Investment Planning: Equities and Derivatives	
	Investment Planning: Portfolio management	
18 May (Double Session)	Investment Planning: Investment Planning Process and Investment Vehicles	
	Insurance Law	
25 May (Double Session)	Business Entities: Law and Taxation	Corporate
	Business Valuation & Financial Statements	
8 June	Healthcare	
22 June	Compliance: Compliance & Ethics 1	Environment
29 June	Compliance: Compliance & Ethics 2	
13 July	Case study 1: Principles and techniques	Case Study
27 July	Case study 2: Case studies	

2019 MOCK EXAM SCHEDULE:

17 August	Financial Planning Environment (LFPE) Mock Exam
18 August	Corporate Financial Planning (LFPC) Mock Exam
24 August	Personal Financial Planning (LFPP) Mock Exam
25 August	Case Study (LFPS) Mock Exam

FREE

ORIENTATION EVENING

LightBulb LEARNING & TRAINING

from information to inspiration

DEAR LIGHTBULB LEARNER

I invite you all to a free orientation evening on **Wednesday, 20 February 2019** 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: ***Financial Calculations and Worksheets 2019***. 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.

Register today at: **www.lightbulblearning.co.za**

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

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

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

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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	☐	☐
Personal Financial Planning	☐	☐
Corporate Financial Planning	☐	☐
Case Study	☐	☐

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

SUBMIT FORM

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.