FACE-TO-FACE LECTURES

FOR STUDENTS OF THE 2020 **POST GRADUATE DIPLOMA IN FINANCIAL PLANNING** AND THE **CFP® PROFESSIONAL COMPETENCY EXAMINATION**

Lightbulb learning & training

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

R450 per lecture and
R900 per Mock Exam

There is a 10% 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.

2020 LECTURE SCHEDULE:

SATURDAY MORNING 9am – 12pm	WEDNESDAY EVENING 5pm – 8pm	TOPIC	SUBJECT
	26 February	**Orientation (5pm – 8pm)**	**All**
29 February	4 March	**Quantitative methods 1:** Time value of money and discounted cash flows	Environment Personal Case study
7 March	18 March	**Quantitative methods 2:** Needs analysis calculations	
21 March	1 April	**Tax 1:** Income Tax	Environment Case Study
	15 April	**Tax 2:** Capital Gains Tax	Environment Personal Case study
4 April	22 April	**Tax 3:** Donations Tax, Transfer Duty and Taxation of Lump Sum Benefits	
18 April	29 April	**Estate Planning:** Marriage & Matrimonial Property and Family Law	
	6 May	**Estate Planning:** The Law of Succession and Limited Rights	
25 April	13 May	**Estate Planning:** Estate Duty	
9 May	20 May	**Estate Planning:** Business Insurance	Corporate Case study
16 May	27 May	**Estate Planning:** Trust law and Taxation	Environment Personal Case study
	3 June	**Estate Planning:** Estate planning	Personal Case study
23 May	10 June	**Retirement Planning:** Law of retirement funds	Personal, Corporate, Case Study
	17 June	**Retirement Planning:** Retirement planning	
30 May	24 June	**Investment Planning:** Risk & return calculations	Personal, Case Study
13 June	1 July	**Investment Planning:** Money markets and bonds	
20 June	8 July	**Investment Planning:** Equities and Derivatives	
27 June	15 July	**Investment Planning:** Portfolio management	
	22 July	**Investment Planning:** Investment Planning Process and Investment Vehicles	
4 July	29 July	**Insurance Law**	
11 July	5 August	**Healthcare**	Corporate
18 July	12 August	**Business Entities:** Law and Taxation	
	13 August	**Business Valuation & Financial Statements**	
25 July	19 August	**Compliance:** Compliance & Ethics 1	Environment
	20 August	**Compliance:** Compliance & Ethics 2	
1 August	26 August	**Case study 1:** Technique and Application	Case Study
	27 August	**Case study 2:** Case studies	

MOCK EXAMS	
15 August	**Financial Planning Environment Mock Exam**
16 August	**Corporate Financial Planning Mock Exam**
22 August	**Personal Financial Planning Mock Exam**
23 August	**Case Study Mock Exam**

FREE

ORIENTATION EVENING

Lightbulb learning & training

DEAR LIGHTBULB LEARNER

I invite you all to a free orientation evening on **Wednesday, 26 February 2020** 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.

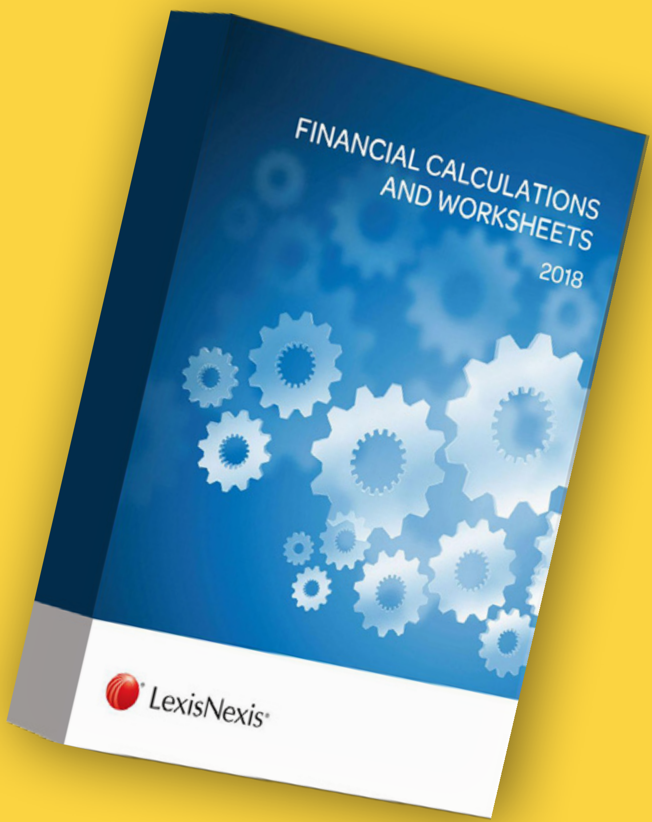
VENUE

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 2020***. 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...

The volume of content that is required to pass the Post Graduate Diploma in Financial Planning programme is daunting. Paul Rabenowitz has been invaluable in breaking this material down into relatable, bite-sized chunks. His notes and templates are easy to follow and his classes are fun and engaging. I truly appreciate the time he took to guide me when I needed to be put back on the right track and to answer all my silly questions. Furthermore, his additional review sessions and mock exams gave me the confidence I needed to face the exams.

I would have been lost without Paul. I attribute my success to him and recommend anyone embarking on this journey to take Paul along with you!

Candyce Bruce

The first time Paul Rabenowitz pitched up to class wearing a superhero cape, I thought to myself: “that is some big shoes to fill and a big responsibility to take.” But after a year of attending classes, review sessions and mock exams I can say Paul truly is a Superhero - Trainer.

I knew nothing of the industry and was a complete blank page when it came to financial planning. Paul’s passion for the industry and training stirred an excitement for what was to come.

He knows every student by name and challenges your thinking and reasoning about all subjects by asking questions and making you wonder, leaving you wanting to learn more.

Paul’s study material was very well put together, he makes boring and difficult theory interesting and understandable. He provides enough fun but challenging examples to practice that enables you to master calculations. His notes and mock exams were the only thing I needed for the exams.

After I started off knowing nothing, with the help of Paul and Lightbulb Learning and Training I was able to pass all four subjects in my first year. I want to thank Paul, because without him I wouldn’t have the courage to attempt this and would never have been able to obtain the knowledge and skills I needed to pass this degree with a distinction.

I highly recommend doing your Post Grad in Financial Planning with the help of Paul and Lightbulb Learning and Training.

Yolandi Muller

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

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.

SUBMIT FORM