



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

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COURSE BROCHURE

Client Relationship Building Skills For Financial Services Training

Business, Commerce and Management Studies / Finance, Economics and Accounting

Unit Standard 113903 · NQF Level 4 · 3 Credits · 1 Day

COURSE OVERVIEW

This course equips financial services professionals with the skills to build and sustain strong client relationships, enhancing trust and loyalty. Participants learn to apply effective communication, manage client expectations, and handle complaints professionally to drive business success.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	113903
Accreditation	SAQA Accredited · NQF Level 4 · 3 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply active listening and questioning techniques to understand client needs.
- Analyze client feedback to identify areas for service improvement.
- Evaluate the effectiveness of different relationship-building strategies in financial contexts.
- Demonstrate professional communication in written and verbal interactions with clients.
- Implement conflict resolution techniques to manage client complaints and retain business.

WHO SHOULD ATTEND

- Financial advisors, relationship managers, client service staff, and other professionals in banking, insurance, and investment sectors who interact directly with clients.

COURSE OUTLINE

Day 1: Foundations of Client Relationship Building in Financial Services

- Introduction to client relationship building in financial services
- Communication skills: active listening, empathy, and clarity
- Building trust and credibility with clients
- Identifying client needs and expectations through questioning techniques
- Handling objections and difficult conversations
- Ethical considerations and compliance in client relationships
- Strategies for maintaining ongoing client engagement
- Practical case studies and role-play scenarios

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **3 NQF credits** at **NQF Level 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 12,800.00	R 12,800.00
1	In-House	R 16,600.00	R 16,600.00
1	On-Campus (Pretoria)	R 19,200.00	R 19,200.00

UPCOMING SESSIONS

Start	End	Method	Venue
03 Aug 2026	03 Aug 2026	On-Campus	Johannesburg, South Africa
04 Aug 2026	04 Aug 2026	On-Campus	Mauritius
05 Aug 2026	05 Aug 2026	On-Campus	Cape Town, South Africa
06 Aug 2026	06 Aug 2026	On-Campus	Dubai, UAE
07 Aug 2026	07 Aug 2026	On-Campus	Pretoria, South Africa
07 Aug 2026	07 Aug 2026	On-Campus	Lagos, Nigeria
10 Aug 2026	10 Aug 2026	On-Campus	Durban, South Africa
10 Aug 2026	10 Aug 2026	On-Campus	Mauritius

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 113903) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
2. **Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
3. **Apply by phone or WhatsApp:** call **+27 12 004 8389** or WhatsApp **+27 65 077 6310** and we will prepare your quotation and reserve your seats.
4. **Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

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