



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

Disability Insurance Solutions For Financial Planning Training

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

Unit Standard 113910 · NQF Level 4 · 4 Credits · 1 Day

COURSE OVERVIEW

This course equips financial planning professionals with the specialised knowledge and skills required to analyse, evaluate, and recommend disability insurance solutions tailored to client needs. Participants will learn to assess disability risk, understand policy features, and integrate disability cover into comprehensive financial plans. The course ensures compliance with South African regulatory frameworks and industry best practices.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	113910
Accreditation	SAQA Accredited · NQF Level 4 · 4 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Analyse the key features, benefits, and exclusions of different disability insurance products available in the South African market.
- Evaluate client needs and financial exposure to disability risk using appropriate assessment tools and techniques.
- Design comprehensive disability insurance solutions that align with clients' financial goals, risk tolerance, and budget constraints.
- Implement disability insurance recommendations by completing application processes and ensuring policy compliance with regulatory requirements.
- Demonstrate the ability to integrate disability cover into holistic financial plans, considering tax implications and estate planning.
- Apply ethical and professional standards when advising clients on disability insurance solutions.

WHO SHOULD ATTEND

- This course is designed for financial advisors, insurance consultants, and wealth managers who advise clients on risk management and insurance within a financial planning context.
- It is also suitable for paraplanners and technical support staff seeking to deepen their understanding of disability insurance solutions.

COURSE OUTLINE

Day 1: Understanding and Applying Disability Insurance Solutions

- Introduction to disability insurance and its importance in financial planning.
- Types of disability cover: income protection, lump sum disability, and critical illness.
- Key policy features: waiting periods, benefit periods, definitions of disability.
- Needs analysis and underwriting considerations.
- Tax implications and integration with other benefits.
- Regulatory framework: FAIS, COFI, and Treating Customers Fairly.
- Ethical considerations and suitability requirements.
- Case studies: matching solutions to client 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 **4 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	Dubai, UAE
04 Aug 2026	04 Aug 2026	On-Campus	Pretoria, South Africa
04 Aug 2026	04 Aug 2026	On-Campus	Lagos, Nigeria
05 Aug 2026	05 Aug 2026	On-Campus	Johannesburg, South Africa
06 Aug 2026	06 Aug 2026	On-Campus	Mauritius
07 Aug 2026	07 Aug 2026	On-Campus	Cape Town, South Africa
10 Aug 2026	10 Aug 2026	On-Campus	Pretoria, South Africa
11 Aug 2026	11 Aug 2026	On-Campus	Abu Dhabi, UAE

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 113910) 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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