



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

Wealth Management Sales Cycle Fundamentals Training

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

Unit Standard 113921 · NQF Level 4 · 3 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the fundamental sales cycle skills required in wealth management, focusing on client acquisition, needs analysis, product positioning, and closing techniques. It bridges the gap between generic sales training and the specialised regulatory and ethical environment of financial services in South Africa.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	113921
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 the stages of the wealth management sales cycle from prospecting to post-sale service.
- Analyse client financial needs and risk profiles to recommend appropriate wealth solutions.
- Evaluate product features and regulatory requirements to match solutions to client objectives.
- Demonstrate ethical selling practices in compliance with FAIS and industry codes.
- Implement a structured sales process to improve conversion rates and client retention.
- Design a personal sales action plan aligned with organisational and regulatory standards.

WHO SHOULD ATTEND

- New and experienced financial advisers, wealth managers, and investment consultants who need to formalise their sales process within the framework of FAIS and other relevant regulations.

COURSE OUTLINE

Day 1: Wealth Management Sales Cycle Fundamentals

- Overview of the wealth management sales cycle
- Client needs analysis and profiling
- Financial product knowledge and suitability
- Communication and interpersonal skills for sales
- Handling objections and closing techniques
- Ethics, compliance, and FAIS requirements
- Building long-term client relationships
- Practical application and case studies

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
05 Aug 2026	05 Aug 2026	On-Campus	Dubai, UAE
06 Aug 2026	06 Aug 2026	On-Campus	Pretoria, South Africa
06 Aug 2026	06 Aug 2026	On-Campus	Lagos, Nigeria
07 Aug 2026	07 Aug 2026	On-Campus	Johannesburg, South Africa
10 Aug 2026	10 Aug 2026	On-Campus	Cape Town, South Africa
11 Aug 2026	11 Aug 2026	On-Campus	Dubai, UAE
12 Aug 2026	12 Aug 2026	On-Campus	Pretoria, South Africa
13 Aug 2026	13 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 113921) 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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