



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

Pre Retirement Planning And Post Retirement Financial Management Training

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

Unit Standard 113931 · NQF Level 4 · 2 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the knowledge and skills to plan effectively for retirement and manage their finances post-retirement. It covers the key principles of retirement planning, investment strategies, and post-retirement financial management to ensure financial security in later years.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	113931
Accreditation	SAQA Accredited · NQF Level 4 · 2 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply the principles of retirement planning to develop a personal retirement strategy.
- Analyze different investment options and their suitability for retirement savings.
- Evaluate the impact of inflation, taxation, and risk on retirement income.
- Design a post-retirement budget and cash flow management plan.
- Implement strategies to manage financial risks in retirement, including healthcare and longevity.
- Demonstrate an understanding of legal and regulatory frameworks related to retirement planning in South Africa.

WHO SHOULD ATTEND

- This course is designed for individuals approaching retirement age, financial advisors, and human resources professionals involved in employee retirement planning.
- It is also suitable for anyone seeking to take control of their financial future.

COURSE OUTLINE

Day 1: Foundations of Pre-Retirement Planning and Post-Retirement Financial Management

- Introduction to retirement planning: lifecycle stages and financial needs.
- Retirement funding vehicles: pension funds, provident funds, retirement annuities, and tax-free savings accounts.
- Tax considerations: contributions, lump sums, and annuities.
- Investment principles for retirement: asset allocation, risk tolerance, and diversification.
- Post-retirement income planning: drawdown strategies and managing longevity risk.
- Estate planning: wills, trusts, and beneficiary nominations.
- Risk management: medical aid, gap cover, and long-term care insurance.
- Regulatory framework: Pension Funds Act, Taxation Laws Amendment Act, and SARS requirements.

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 **2 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
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
14 Aug 2026	14 Aug 2026	On-Campus	Durban, South Africa
14 Aug 2026	14 Aug 2026	On-Campus	Mauritius
17 Aug 2026	17 Aug 2026	On-Campus	Harare, Zimbabwe
17 Aug 2026	17 Aug 2026	On-Campus	Dubai, 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 113931) 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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