



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

Manage A Business Offering Financial Advice Training

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

Unit Standard 119675 · NQF Level 4 · 2 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the skills to manage a business that offers financial advice, including strategic planning, compliance with financial regulations, and ethical client management. It focuses on operational and financial management to ensure sustainable business practices.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	119675
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 principles of financial management to plan, monitor, and control business resources.
- Analyze regulatory requirements and ethical standards to ensure compliance in financial advice businesses.
- Evaluate business performance using financial statements and key performance indicators.
- Design strategies to manage risk and enhance client service delivery.
- Implement systems for client relationship management and business development.
- Demonstrate leadership in managing a team within a financial advisory context.

WHO SHOULD ATTEND

- This course is designed for financial advisors, team leaders, and business owners who manage or intend to manage a financial advisory practice in South Africa.

COURSE OUTLINE

Day 1: Managing a Financial Advice Business

- Regulatory environment: FAIS Act, FSCA, and code of conduct.
- Business structures: sole proprietor, partnership, company.
- Compliance: licensing, record-keeping, and reporting.
- Business planning: vision, mission, and strategic objectives.
- Risk management: identification, mitigation, and insurance.
- Ethical practices: conflict of interest, client confidentiality.
- Performance measurement: KPIs, client feedback, and audits.
- Continuous improvement: training, technology, and market trends.

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	Dubai, UAE
11 Aug 2026	11 Aug 2026	On-Campus	Pretoria, South Africa
12 Aug 2026	12 Aug 2026	On-Campus	Abu Dhabi, UAE
13 Aug 2026	13 Aug 2026	On-Campus	Durban, South Africa
13 Aug 2026	13 Aug 2026	On-Campus	Mauritius
14 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
17 Aug 2026	17 Aug 2026	On-Campus	Pretoria, South Africa
18 Aug 2026	18 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 119675) 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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