



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

Analyse The Financial Services Industry And The Role Of Insurance In A Business Environment Training

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

Unit Standard 119679 · NQF Level 4 · 9 Credits · 6 Days

COURSE OVERVIEW

This course equips learners with the ability to analyse the financial services industry and understand the role of insurance within a business environment. It provides a comprehensive overview of the South African financial services sector, including regulatory frameworks, key participants, and insurance products. Participants will gain the knowledge to evaluate insurance needs and integrate insurance strategies into business risk management.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	119679
Accreditation	SAQA Accredited · NQF Level 4 · 9 Credits
Duration	6 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Analyse the structure and key participants of the South African financial services industry.
- Evaluate the regulatory environment governing financial services and insurance in South Africa.
- Differentiate between various types of insurance products and their applications in a business context.
- Assess the role of insurance in business risk management and continuity planning.
- Apply principles of insurance to identify and mitigate business risks effectively.
- Demonstrate understanding of ethical and professional standards in the financial services industry.

WHO SHOULD ATTEND

- This course is ideal for business professionals, managers, and entrepreneurs who need to understand the financial services industry and the role of insurance in protecting business assets and operations.
- It is also suitable for individuals seeking foundational knowledge in insurance and financial services for career advancement.

COURSE OUTLINE

Day 1: Introduction to the Financial Services Industry

- Overview of the financial services industry
- Key sectors: banking, insurance, investments, and pensions
- Major participants: banks, insurers, brokers, regulators
- Regulatory bodies: FSCA, SARB, NCR
- Economic impact and contribution to GDP
- Trends and challenges in the industry

Day 2: The Role and Types of Insurance

- Definition and purpose of insurance
- Life insurance: term, whole life, endowment
- Non-life insurance: motor, property, liability
- Risk pooling and law of large numbers
- Underwriting process
- Insurance contract: insurer, policyholder, beneficiary

Day 3: Insurance Products and Their Business Applications

- Business insurance: property, liability, business interruption
- Key person insurance and buy-and-sell agreements
- Employee benefits: group life, medical aid, retirement
- Risk management and insurance as a tool
- Claims process: notification, assessment, settlement
- Premium calculation and factors

Day 4: The Business Environment and Insurance Integration

- External factors: economic, legal, technological
- Internal factors: size, industry, risk appetite
- Business continuity planning
- Compliance requirements: compulsory insurance
- Insurance and financial planning
- Case studies: insurance in different business scenarios

Day 5: Regulatory and Ethical Considerations in Insurance

- Insurance Act, 2017
- Policyholder Protection Rules
- Treating Customers Fairly (TCF) principles
- Role of the FSCA and Ombudsman
- Ethical issues: mis-selling, non-disclosure, conflicts of interest
- Consumer rights and complaints procedures

Day 6: Practical Application and Course Integration

- Needs analysis: identifying risks and coverage gaps
- Selecting appropriate insurance products
- Presenting insurance proposals
- Group exercise: case study analysis
- Review of key concepts

- Assessment and feedback

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 **9 NQF credits** at **NQF Level 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 25,600.00	R 25,600.00
1	In-House	R 33,300.00	R 33,300.00
1	On-Campus (Pretoria)	R 38,400.00	R 38,400.00

UPCOMING SESSIONS

Start	End	Method	Venue
31 Jul 2026	07 Aug 2026	On-Campus	Mauritius
03 Aug 2026	10 Aug 2026	On-Campus	Dubai, UAE
04 Aug 2026	11 Aug 2026	On-Campus	Pretoria, South Africa
04 Aug 2026	11 Aug 2026	On-Campus	Lagos, Nigeria
05 Aug 2026	12 Aug 2026	On-Campus	Johannesburg, South Africa
06 Aug 2026	13 Aug 2026	On-Campus	Mauritius
07 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
10 Aug 2026	17 Aug 2026	On-Campus	Pretoria, South Africa

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 119679) 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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