



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 Preservation Solution Development for Entities

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

Unit Standard 242555 · NQF Level 6 · 8 Credits · 5 Days

COURSE OVERVIEW

This course equips learners with the skills and knowledge to develop a comprehensive wealth preservation solution for an entity. Participants will learn to analyze financial risks, evaluate preservation strategies, and design a tailored plan that aligns with the entity's objectives and regulatory requirements. The course emphasizes practical application in the South African corporate context.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242555
Accreditation	SAQA Accredited · NQF Level 6 · 8 Credits
Duration	5 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Analyze the financial position and risk profile of an entity to identify wealth preservation needs.
- Evaluate various wealth preservation instruments and strategies, including trusts, insurance, and investment vehicles.
- Design a comprehensive wealth preservation solution that addresses identified risks and aligns with entity objectives.
- Apply relevant South African legislation and tax implications to the wealth preservation solution.
- Implement the wealth preservation plan, including documentation, stakeholder communication, and monitoring mechanisms.
- Demonstrate the ability to review and adjust the wealth preservation solution in response to changing circumstances.

WHO SHOULD ATTEND

- This course is designed for financial advisors, wealth managers, accountants, and finance professionals who are responsible for developing or advising on wealth preservation strategies for entities.
- It is also suitable for business owners and executives seeking to understand wealth preservation solutions.

COURSE OUTLINE

Day 1: Understanding Wealth Preservation and Regulatory Framework

- Introduction to wealth preservation for entities
- Types of risks: market, credit, operational, legal
- South African regulatory framework: FAIS, FICA, POPIA
- Fiduciary duties and governance principles
- Overview of wealth preservation solutions
- Case study: Entity loss due to lack of preservation

Day 2: Asset Protection Strategies and Legal Structures

- Legal structures for wealth holding: trusts, companies, foundations
- Ring-fencing assets and liability management
- Insurance as a wealth preservation tool
- Contractual protections: indemnities, guarantees
- Tax considerations for asset protection
- Practical exercise: Design a simple asset protection structure

Day 3: Investment and Growth Strategies for Long-Term Preservation

- Asset classes: equities, bonds, property, alternatives
- Portfolio construction for capital preservation
- Hedging: options, futures, currency forwards
- Rebalancing strategies and reallocation triggers
- Impact of inflation and interest rates
- Practical exercise: Build a preservation-focused portfolio

Day 4: Estate Planning and Succession for Entities

- Estate planning fundamentals: wills, trusts, executors
- Succession planning for family businesses and entities
- Tax-efficient wealth transfer: estate duty, CGT, donations tax
- Business continuity agreements: buy-and-sell, key person insurance
- Practical exercise: Create an estate plan for a family-owned entity

Day 5: Integrated Wealth Preservation Solution Development and Implementation

- Integration of asset protection, investment, and estate planning
- Implementation plan: timelines, responsibilities, costs
- Monitoring and review mechanisms
- Ethical and compliance considerations
- Case study: Presenting a solution to a board
- Future trends: digital assets, globalisation, ESG

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 **8 NQF credits** at **NQF Level 6**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 25,300.00	R 25,300.00
1	In-House	R 32,900.00	R 32,900.00
1	On-Campus (Pretoria)	R 38,000.00	R 38,000.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	14 Aug 2026	On-Campus	Durban, South Africa
10 Aug 2026	14 Aug 2026	On-Campus	Abu Dhabi, UAE
10 Aug 2026	14 Aug 2026	On-Campus	Pretoria, South Africa
10 Aug 2026	14 Aug 2026	On-Campus	Dubai, UAE
10 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
10 Aug 2026	14 Aug 2026	On-Campus	Mauritius
17 Aug 2026	21 Aug 2026	On-Campus	Dubai, UAE
17 Aug 2026	21 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 242555) 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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