



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

Intermediary and Long-Term Insurer Relationship Management

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

Unit Standard 242558 · NQF Level 5 · 5 Credits · 2 Days

COURSE OVERVIEW

This course equips intermediaries and insurance professionals with the skills to effectively manage relationships with long-term insurers. It focuses on understanding the regulatory environment, contractual obligations, and communication strategies to foster mutually beneficial partnerships.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242558
Accreditation	SAQA Accredited · NQF Level 5 · 5 Credits
Duration	2 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply the principles of relationship management to interactions with long-term insurers.
- Analyze the regulatory and contractual framework governing intermediary-insurer relationships.
- Evaluate the roles and responsibilities of intermediaries and insurers in the long-term insurance context.
- Implement strategies to resolve conflicts and enhance collaboration between parties.
- Demonstrate effective communication and negotiation skills in insurer relationship management.
- Design a relationship management plan that aligns with organizational and regulatory requirements.

WHO SHOULD ATTEND

- Financial advisors, insurance brokers, and intermediary firm managers who interact with long-term insurers and need to strengthen relationship management practices.

COURSE OUTLINE

Day 1: Foundations of Intermediary and Long-Term Insurer Relationships

- Overview of the South African long-term insurance industry.
- Roles of intermediaries: brokers, agents, and financial advisors.
- Regulatory environment: FAIS, FSCA, and the Long-term Insurance Act.
- Policy lifecycle: needs analysis, proposal, underwriting, policy issue, claims.
- Fiduciary duties and treating customers fairly (TCF).
- Communication channels and information flow between intermediary and insurer.
- Conflict of interest management and disclosure requirements.
- Case study: Scenario analysis of an intermediary-insurer interaction.

Day 2: Advanced Relationship Management and Practical Integration

- Building trust and collaboration: negotiation and communication skills.
- Service level agreements: key performance indicators and monitoring.
- Handling complaints and disputes: process and resolution.
- Regulatory reporting and compliance obligations.
- Technology in relationship management: CRM systems and digital platforms.
- Trends and challenges in the long-term insurance market.
- Group exercise: Developing a relationship management plan.
- Final assessment and course wrap-up.

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 **5 NQF credits** at **NQF Level 5**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 16,200.00	R 16,200.00
1	In-House	R 21,000.00	R 21,000.00
1	On-Campus (Pretoria)	R 24,300.00	R 24,300.00

UPCOMING SESSIONS

Start	End	Method	Venue
11 Aug 2026	12 Aug 2026	On-Campus	Durban, South Africa
11 Aug 2026	12 Aug 2026	On-Campus	Pretoria, South Africa
11 Aug 2026	12 Aug 2026	On-Campus	Cape Town, South Africa
13 Aug 2026	14 Aug 2026	On-Campus	Abu Dhabi, UAE
13 Aug 2026	14 Aug 2026	On-Campus	Dubai, UAE
13 Aug 2026	14 Aug 2026	On-Campus	Mauritius
17 Aug 2026	18 Aug 2026	On-Campus	Dubai, UAE
17 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 242558) 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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