



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

Tel: +27 12 004 8389 · Mobile: +27 65 077 6310

Email: apply@aaticd.co.za · Website: www.aaticd.co.za

COURSE BROCHURE

Sales and Marketing of Collective Investment Scheme Portfolios

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

Unit Standard 242560 · NQF Level 5 · 4 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the technical knowledge and insight required to effectively market and sell participatory interests in collective investment scheme portfolios. It covers regulatory frameworks, product features, and ethical sales practices within the South African financial services context.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242560
Accreditation	SAQA Accredited · NQF Level 5 · 4 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply knowledge of collective investment scheme structures, types, and regulatory requirements to sales and marketing activities.
- Analyze investor profiles and match suitable participatory interests in collective investment scheme portfolios.
- Evaluate the performance and risk characteristics of different collective investment scheme portfolios.
- Implement compliant marketing strategies that align with FAIS and CISC regulations.
- Demonstrate ethical sales practices by applying the Code of Conduct and disclosure requirements.
- Design client communication materials that accurately reflect fund features and risks.

WHO SHOULD ATTEND

- This course is designed for financial advisors, investment consultants, and sales professionals operating in the collective investment scheme industry who seek to deepen their technical expertise and comply with regulatory standards.

COURSE OUTLINE

Day 1: Fundamentals of Sales and Marketing for Collective Investment Schemes

- Overview of collective investment schemes: unit trusts, ETFs, and REITs.
- Regulatory environment: FAIS, CISC, and ASISA guidelines.
- Marketing principles for financial products: segmentation, targeting, positioning.
- Sales process: prospecting, needs analysis, product matching, and closing.
- Disclosure requirements: fact sheets, minimum disclosure documents, and warnings.
- Ethical considerations and treating customers fairly (TCF).
- Performance measurement and benchmarks.
- Case studies on successful marketing campaigns.

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

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 13,400.00	R 13,400.00
1	In-House	R 17,400.00	R 17,400.00
1	On-Campus (Pretoria)	R 20,200.00	R 20,200.00

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 242560) 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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