



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

Retirement Fund Implementation for Organisations

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

Unit Standard 242564 · NQF Level 6 · 8 Credits · 5 Days

COURSE OVERVIEW

This course equips learners with the knowledge and skills to structure and implement a retirement fund for an organisation. It covers the legal, regulatory, and practical aspects of retirement fund establishment and administration, enabling participants to apply sound governance and fiduciary principles.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242564
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

- Apply knowledge of retirement fund legislation and regulatory frameworks to structure a fund.
- Analyze the financial and tax implications of different retirement fund types for an organisation.
- Evaluate the roles and responsibilities of fund trustees, administrators, and service providers.
- Design a retirement fund implementation plan that aligns with organisational objectives and member needs.
- Demonstrate the process of registering a retirement fund with the relevant authorities.
- Implement governance and compliance measures to ensure ongoing fund integrity.

WHO SHOULD ATTEND

- This course is designed for HR managers, financial officers, trustees, and consultants involved in the design or management of organisational retirement funds.

COURSE OUTLINE

Day 1: Introduction to Retirement Funds and Regulatory Framework

- Overview of retirement fund landscape in SA
- Types of funds: pension, provident, retirement annuity, preservation funds
- Pension Funds Act 24 of 1956 and amendments
- Role of the Financial Sector Conduct Authority (FSCA)
- Trustee responsibilities and code of conduct
- Fund rules and their importance
- Tax considerations: contributions, lump sums, annuities
- Introduction to default regulations and preservation

Day 2: Fund Design, Benefits, and Contributions

- Defined benefit vs defined contribution: features, advantages, disadvantages
- Contribution structures: employer, employee, additional voluntary
- Benefit calculations: retirement, death, disability, withdrawal
- Risk benefits: group life, income protection, critical illness
- Fund rules and benefit specifications
- Impact of salary structures on contributions
- Introduction to actuarial valuations (conceptual)
- Communication of benefits to members

Day 3: Fund Administration and Member Services

- Administration system requirements and data management
- Contribution processing and reconciliation
- Member enrolment, exits, and transfers
- Benefit payment processes: retirement, withdrawal, death claims
- Member statements and annual benefit statements
- Communication strategies: member education, retirement planning
- Reporting to trustees and regulators
- Compliance with POPIA and data protection

Day 4: Governance, Compliance, and Risk Management

- Governance framework: King IV, PF Circulars
- Trustee training and performance evaluation
- Compliance risk management plan
- Investment policy statement and asset allocation
- Service level agreements with administrators and asset managers
- Conflict of interest management
- Internal controls and audit requirements
- Reporting to FSCA and Registrar

Day 5: Implementation, Communication, and Practical Integration

- Steps to implement a new retirement fund or change existing fund
- Employee communication and enrolment campaigns
- Integration with payroll and HR systems
- Managing fund transitions and member education
- Case studies: successful implementations and pitfalls

- Future trends: preservation, annuities, default strategies
- Review of course and assessment preparation

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 242564) 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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