



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

Culture and Diversity Impact on Wealth Management

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

Unit Standard 242566 · NQF Level 5 · 3 Credits · 1 Day

COURSE OVERVIEW

This course equips financial professionals with the skills to research and understand how culture and diversity shape attitudes towards wealth creation and management. Participants will learn to integrate cultural sensitivity into client interactions and financial planning strategies, enhancing client trust and service delivery.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242566
Accreditation	SAQA Accredited · NQF Level 5 · 3 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Analyze the influence of cultural values and diversity on attitudes to wealth creation and management.
- Evaluate how different cultural perspectives affect financial decision-making and risk tolerance.
- Apply culturally sensitive communication strategies to build trust and rapport with diverse clients.
- Design wealth management plans that respect and incorporate clients' cultural and diversity-related preferences.
- Demonstrate the ability to research and document cultural influences on financial behavior.
- Implement inclusive practices that promote equitable access to wealth management services.

WHO SHOULD ATTEND

- Wealth managers, financial advisors, and investment consultants who work with diverse client bases in South Africa and globally.

COURSE OUTLINE

Day 1: Foundations of Culture and Diversity in Wealth Management

- Introduction to culture and diversity concepts.
- Cultural dimensions: individualism vs collectivism, power distance, uncertainty avoidance.
- Influence of culture on saving, spending, and investment behaviour.
- Diversity in South Africa: race, language, religion, and socioeconomic background.
- Ethical and regulatory considerations: FAIS, Code of Conduct, and Treating Customers Fairly.
- Inclusive communication: active listening, empathy, and avoiding stereotypes.
- Case studies: cultural misunderstandings in wealth management.
- Practical strategies for building trust across diverse client groups.

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 **3 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	Durban, South Africa
10 Aug 2026	10 Aug 2026	On-Campus	Mauritius
11 Aug 2026	11 Aug 2026	On-Campus	Cape Town, South Africa
12 Aug 2026	12 Aug 2026	On-Campus	Dubai, UAE
13 Aug 2026	13 Aug 2026	On-Campus	Pretoria, South Africa
14 Aug 2026	14 Aug 2026	On-Campus	Abu Dhabi, UAE
17 Aug 2026	17 Aug 2026	On-Campus	Shenzhen, China
18 Aug 2026	18 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 242566) 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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