



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

Financial Priorities and Value Proposition in Relationships

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

Unit Standard 242569 · NQF Level 5 · 3 Credits · 1 Day

COURSE OVERVIEW

This course equips financial advisors and relationship managers with the insight to understand how clients' changing financial priorities and attitudes impact the value proposition in financial relationships. Participants will learn to analyze shifts in financial behavior and adapt their advisory approach to maintain strong client relationships.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242569
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 impact of changing financial priorities and attitudes on the value proposition in financial relationships.
- Apply insight into how clients' life stages and events influence their financial priorities.
- Evaluate different financial attitudes and their implications for client-advisor relationships.
- Design strategies to align financial advice with clients' shifting priorities.
- Implement communication techniques to address changing client expectations.
- Demonstrate the ability to adjust value propositions to maintain client satisfaction and loyalty.

WHO SHOULD ATTEND

- Financial advisors, relationship managers, and client-facing professionals in banking, insurance, and investment firms who need to understand and respond to evolving client financial priorities.

COURSE OUTLINE

Day 1: Financial Priorities and Value Proposition in Relationships

- Introduction to financial priorities in relationships
- Core financial concepts: budgeting, saving, debt, and investment
- Identifying and aligning personal financial values
- Value proposition: mutual benefit and shared goals
- Communication strategies for financial discussions
- Conflict resolution around money matters
- Case studies: financial challenges in relationships
- Creating a joint financial plan

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	Dubai, UAE
11 Aug 2026	11 Aug 2026	On-Campus	Pretoria, South Africa
12 Aug 2026	12 Aug 2026	On-Campus	Abu Dhabi, UAE
13 Aug 2026	13 Aug 2026	On-Campus	Durban, South Africa
13 Aug 2026	13 Aug 2026	On-Campus	Mauritius
14 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
17 Aug 2026	17 Aug 2026	On-Campus	Pretoria, South Africa
18 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 242569) 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.

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 · WhatsApp: +27 65 077 6310 · apply@aaticd.co.za · www.aaticd.co.za