



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

Financial Needs Analysis and Solution Proposals

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

Unit Standard 242573 · NQF Level 5 · 4 Credits · 1 Day

COURSE OVERVIEW

This course equips financial professionals with the skills to conduct a thorough financial needs analysis for entities, including individuals, businesses, and organisations. Participants learn to identify financial needs and wants, evaluate financial situations, and propose appropriate financial solutions that align with client objectives and regulatory requirements.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242573
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 a structured process to determine the financial needs and wants of an entity through interviews and data analysis.
- Analyze financial information to identify gaps between current and desired financial positions.
- Evaluate alternative financial solutions based on suitability, affordability, and compliance with relevant legislation.
- Design a comprehensive financial solution proposal that addresses identified needs and wants.
- Implement the proposal by presenting findings and recommendations to the client in a clear and persuasive manner.
- Demonstrate ethical conduct and adherence to the Financial Advisory and Intermediary Services (FAIS) Act and other regulatory frameworks.

WHO SHOULD ATTEND

- Financial advisors, consultants, and analysts who are required to assess client financial needs and recommend suitable products or strategies.
- Also suitable for relationship managers and sales professionals in the financial services industry.

COURSE OUTLINE

Day 1: Financial Needs Analysis and Solution Proposals

- Introduction to financial needs analysis: concepts, legislation, and ethics.
- Client engagement: gathering financial data, risk profile, and needs assessment.
- Analytical techniques: cash flow analysis, risk assessment, and gap identification.
- Solution design: product knowledge, suitability, and compliance.
- Proposal writing: structure, clarity, and client-focused recommendations.
- Presentation and communication skills for proposal delivery.
- Case study: practical application of analysis and proposal.
- Review and assessment.

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
07 Aug 2026	07 Aug 2026	On-Campus	Cape Town, South Africa
10 Aug 2026	10 Aug 2026	On-Campus	Pretoria, South Africa
11 Aug 2026	11 Aug 2026	On-Campus	Abu Dhabi, UAE
12 Aug 2026	12 Aug 2026	On-Campus	Durban, South Africa
12 Aug 2026	12 Aug 2026	On-Campus	Mauritius
13 Aug 2026	13 Aug 2026	On-Campus	Cape Town, South Africa
14 Aug 2026	14 Aug 2026	On-Campus	Dubai, UAE
17 Aug 2026	17 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 242573) 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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