



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

Tax Optimisation Proposal for Wealth Management

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

Unit Standard 242574 · NQF Level 5 · 4 Credits · 1 Day

COURSE OVERVIEW

This course equips financial advisors and wealth managers with the skills to develop and present comprehensive tax optimisation proposals for high-net-worth clients. Participants will learn to analyse tax implications of investment structures, recommend strategies to minimise tax liability, and communicate complex tax concepts effectively.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242574
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

- Analyse the tax implications of various wealth management structures (e.g., trusts, companies, retirement funds) for a given client scenario.
- Evaluate tax optimisation opportunities within the framework of South African tax legislation, including capital gains tax, estate duty, and income tax.
- Design a tailored tax optimisation proposal that aligns with the client's wealth management objectives and risk profile.
- Implement compliance and reporting requirements relevant to the proposed tax strategies.
- Demonstrate effective presentation skills to articulate the proposal's benefits and risks to clients and stakeholders.

WHO SHOULD ATTEND

- Wealth managers, financial advisors, tax practitioners, and investment consultants who advise clients on wealth structuring and tax-efficient investment strategies.

COURSE OUTLINE

Day 1: Tax Optimisation Strategies for Wealth Management

- Overview of the South African tax system for individuals and trusts
- Tax-efficient investment vehicles: retirement annuities, tax-free savings accounts, endowments
- Capital gains tax planning and primary residence exclusion
- Dividend withholding tax and interest exemption thresholds
- Use of trusts and companies for wealth transfer and income splitting
- Offshore investments: exchange control regulations and foreign tax credits
- Estate planning and donation tax implications
- Practical case study: constructing a tax-optimised portfolio

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	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 242574) 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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