



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 Benefits Legislative Impact

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

Unit Standard 242586 · NQF Level 5 · 6 Credits · 3 Days

COURSE OVERVIEW

This course equips learners with the technical knowledge and insight to understand how the legislative and regulatory environment impacts retirement fund benefits for employees. Participants will gain the ability to apply relevant laws and regulations to ensure compliance and protect employee benefits. The course bridges the gap between legislation and practical fund administration.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242586
Accreditation	SAQA Accredited · NQF Level 5 · 6 Credits
Duration	3 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply the key provisions of the Pension Funds Act and related legislation to retirement fund benefit administration.
- Analyze the impact of regulatory changes on retirement fund benefits and member communication.
- Evaluate compliance requirements for retirement funds under South African law.
- Demonstrate the ability to calculate minimum benefits and handle withdrawals, transfers, and retirements in line with legislation.
- Implement procedures for managing death benefits and divorce orders as per regulatory requirements.
- Assess the role of the Registrar of Pension Funds and the Financial Sector Conduct Authority in fund governance.

WHO SHOULD ATTEND

- This course is designed for human resources professionals, pension fund administrators, compliance officers, and employee benefit consultants who need to apply legislative requirements to retirement fund benefits.

COURSE OUTLINE

Day 1: Foundations of Retirement Fund Legislation

- Overview of the South African retirement fund landscape
- Pension Funds Act (No. 24 of 1956) and amendments
- Income Tax Act provisions related to retirement funds
- Role of the Financial Sector Conduct Authority (FSCA)
- Fund governance: board of trustees, principal officer, and compliance
- Legal requirements for fund rules and benefit structures
- Introduction to default regulations and preservation requirements
- Recent legislative updates and their implications

Day 2: Benefit Calculations and Member Rights

- Benefit calculation methods: defined benefit vs defined contribution
- Withdrawal benefits: preservation, lump sums, and transfer rules
- Retirement benefits: annuities, lump sums, and compulsory purchase
- Death benefits: section 37C of the Pension Funds Act
- Tax treatment of contributions, growth, and withdrawals
- Divorce and maintenance: section 37D deductions
- Member communication and disclosure requirements
- Complaints and dispute resolution mechanisms

Day 3: Compliance, Risk Management, and Practical Application

- Compliance monitoring and reporting to FSCA
- Risk management: governance failures, fraud, and data protection
- Code of conduct for fund administrators
- Pension Funds Adjudicator: role and case studies
- Implementation of default regulations: preservation, portability, and annuitisation
- Member education and financial literacy initiatives
- Impact of National Treasury proposals on retirement reforms
- Case studies: applying legislation to complex scenarios

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 **6 NQF credits** at **NQF Level 5**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 18,800.00	R 18,800.00
1	In-House	R 24,500.00	R 24,500.00
1	On-Campus (Pretoria)	R 28,100.00	R 28,100.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	12 Aug 2026	On-Campus	Pretoria, South Africa
10 Aug 2026	12 Aug 2026	On-Campus	Mauritius
11 Aug 2026	13 Aug 2026	On-Campus	Abu Dhabi, UAE
11 Aug 2026	13 Aug 2026	On-Campus	Cape Town, South Africa
12 Aug 2026	14 Aug 2026	On-Campus	Durban, South Africa
12 Aug 2026	14 Aug 2026	On-Campus	Dubai, UAE
17 Aug 2026	19 Aug 2026	On-Campus	Harare, Zimbabwe
17 Aug 2026	19 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 242586) 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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