



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

Asset Classes for Financial Advice

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

Unit Standard 242594 · NQF Level 5 · 4 Credits · 1 Day

COURSE OVERVIEW

This course equips financial advisors with the knowledge to identify, compare, and apply different asset classes when providing financial advice. Participants will learn to evaluate the characteristics, risks, and returns of asset classes such as equities, bonds, property, and cash. The course ensures advisors can align asset class selection with client risk profiles and investment objectives.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242594
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 knowledge of asset classes, including equities, bonds, property, cash, and alternative investments, to describe their key features and risks.
- Analyze the risk-return profiles of different asset classes to determine their suitability for various client scenarios.
- Evaluate economic and market factors that influence asset class performance and integrate this analysis into financial advice.
- Implement asset allocation strategies that align with client risk tolerance, time horizon, and financial goals.
- Demonstrate the ability to justify asset class recommendations using relevant regulatory and industry standards.

WHO SHOULD ATTEND

- This course is designed for financial advisors, investment consultants, and wealth managers who provide financial advice to individuals or institutions.
- It is also suitable for aspiring advisors seeking to meet competency requirements for financial advisory roles.

COURSE OUTLINE

Day 1: Understanding Asset Classes for Financial Advice

- Introduction to asset classes: cash, bonds, equities, property, and alternatives.
- Characteristics and risk-return profiles of each asset class.
- The role of diversification in portfolio construction.
- Performance measurement and benchmarks.
- Regulatory framework: FAIS, FICA, and suitability requirements.
- Asset class allocation strategies.
- Practical considerations for financial advisors.
- Case studies: matching asset classes to client goals.

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 242594) 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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