



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 Administration Effectiveness Evaluation

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

Unit Standard 242596 · NQF Level 5 · 5 Credits · 2 Days

COURSE OVERVIEW

This course equips learners with the skills to evaluate the effectiveness of a retirement fund's administration function, enabling informed decision-making. Participants will learn to assess compliance, operational efficiency, and service delivery against industry standards and regulatory requirements. The course empowers trustees, administrators, and fund managers to identify areas for improvement and ensure optimal fund performance.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242596
Accreditation	SAQA Accredited · NQF Level 5 · 5 Credits
Duration	2 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Evaluate the administration function of a retirement fund against relevant legislation, rules, and industry best practices.
- Analyze key performance indicators and service level agreements to assess operational efficiency and effectiveness.
- Identify and recommend corrective actions for administrative deficiencies or non-compliance issues.
- Apply risk management principles to evaluate the adequacy of internal controls within the administration function.
- Demonstrate the ability to compile a comprehensive evaluation report with evidence-based findings and recommendations.
- Implement a structured evaluation framework to support informed decision-making regarding fund administration.

WHO SHOULD ATTEND

- This course is designed for retirement fund trustees, principal officers, fund administrators, and compliance officers who are responsible for overseeing or managing the administration of retirement funds.
- It is also suitable for financial advisors and consultants seeking to deepen their understanding of fund administration evaluation.

COURSE OUTLINE

Day 1: Foundations of Retirement Fund Administration and Evaluation Frameworks

- Overview of retirement fund types and legal framework (Pension Funds Act, tax regulations).
- Roles and responsibilities of fund administrators, trustees, and service providers.
- Key administration functions: member records, contributions, benefits, and reporting.
- Introduction to effectiveness evaluation: metrics, benchmarks, and standards.
- Common administration errors and their impact on fund performance.
- Case study: evaluating a sample fund's administration processes.

Day 2: Advanced Evaluation Techniques and Practical Application

- Detailed evaluation methodology: data collection, analysis, and reporting.
- Using key performance indicators (KPIs) for administration effectiveness.
- Root cause analysis of administrative failures.
- Benchmarking against industry best practices.
- Developing an improvement plan: prioritisation and implementation.
- Risk assessment in fund administration: fraud, errors, and compliance.
- Group exercise: evaluating a real-world fund administration scenario.

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

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 16,200.00	R 16,200.00
1	In-House	R 21,000.00	R 21,000.00
1	On-Campus (Pretoria)	R 24,300.00	R 24,300.00

UPCOMING SESSIONS

Start	End	Method	Venue
11 Aug 2026	12 Aug 2026	On-Campus	Abu Dhabi, UAE
11 Aug 2026	12 Aug 2026	On-Campus	Dubai, UAE
11 Aug 2026	12 Aug 2026	On-Campus	Mauritius
13 Aug 2026	14 Aug 2026	On-Campus	Durban, South Africa
13 Aug 2026	14 Aug 2026	On-Campus	Pretoria, South Africa
13 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
17 Aug 2026	18 Aug 2026	On-Campus	Pretoria, South Africa
17 Aug 2026	18 Aug 2026	On-Campus	Durban, South Africa

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 242596) 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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