



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

Insurance and Retirement Benefits Advisory Skills

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

Unit Standard 242597 · NQF Level 6 · 5 Credits · 2 Days

COURSE OVERVIEW

This course equips participants with the technical knowledge and skills required to advise business entities on insurance and group retirement benefits. It covers the application of relevant legislation, product features, and advisory processes to meet the needs of corporate clients effectively.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242597
Accreditation	SAQA Accredited · NQF Level 6 · 5 Credits
Duration	2 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply knowledge of insurance and retirement benefit products to advise business entities on suitable solutions.
- Analyze the legislative and regulatory framework governing insurance and group retirement benefits in South Africa.
- Evaluate the financial needs of business entities and recommend appropriate insurance and retirement benefit structures.
- Demonstrate the ability to communicate complex benefit information to business clients clearly and ethically.
- Implement advisory processes that comply with industry codes of conduct and fiduciary responsibilities.

WHO SHOULD ATTEND

- This course is designed for financial advisors, insurance brokers, and employee benefits consultants who advise business entities on insurance and group retirement benefits.
- It is also suitable for professionals seeking to specialize in corporate benefits advisory.

COURSE OUTLINE

Day 1: Fundamentals of Insurance and Retirement Planning

- Overview of the South African financial services sector
- Types of insurance: life, disability, health, and short-term
- Retirement planning vehicles: pension funds, provident funds, retirement annuities
- Risk management principles and needs analysis
- Regulatory framework: FAIS, FSCA, Treating Customers Fairly (TCF)
- Ethics and professional standards for advisors
- Initial client consultation and fact-finding

Day 2: Advanced Advisory Skills and Practical Application

- Comprehensive needs analysis techniques
- Matching products to client profiles
- Retirement income planning: annuities, living annuities, drawdown strategies
- Tax considerations in insurance and retirement planning
- Disclosure, quotations, and suitability reports
- Objection handling and client communication skills
- Ongoing advice and policy review processes
- Case studies and role-play 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 **5 NQF credits** at **NQF Level 6**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 16,900.00	R 16,900.00
1	In-House	R 22,000.00	R 22,000.00
1	On-Campus (Pretoria)	R 25,400.00	R 25,400.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	11 Aug 2026	On-Campus	Durban, South Africa
10 Aug 2026	11 Aug 2026	On-Campus	Pretoria, South Africa
10 Aug 2026	11 Aug 2026	On-Campus	Cape Town, South Africa
12 Aug 2026	13 Aug 2026	On-Campus	Abu Dhabi, UAE
12 Aug 2026	13 Aug 2026	On-Campus	Dubai, UAE
12 Aug 2026	13 Aug 2026	On-Campus	Mauritius
18 Aug 2026	19 Aug 2026	On-Campus	Pretoria, South Africa
18 Aug 2026	19 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 242597) 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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