



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

Estate Planning for Financial Solutions

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

Unit Standard 242603 · NQF Level 5 · 8 Credits · 5 Days

COURSE OVERVIEW

This course equips learners with the knowledge and skills required to apply estate planning principles in proposing financial solutions tailored to specific client needs. It covers key concepts such as wills, trusts, estate duty, and the administration of deceased estates, enabling learners to integrate estate planning into comprehensive financial advice.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242603
Accreditation	SAQA Accredited · NQF Level 5 · 8 Credits
Duration	5 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply knowledge of estate planning principles to assess a client's financial situation and objectives.
- Analyze the legal and tax implications of different estate planning tools, including wills, trusts, and estate duty.
- Evaluate the suitability of estate planning strategies for a specific client profile.
- Design a comprehensive estate plan that proposes a financial solution aligned with client goals.
- Demonstrate the ability to communicate estate planning recommendations effectively to clients.
- Implement estate planning strategies in accordance with relevant legislation and ethical standards.

WHO SHOULD ATTEND

- This course is designed for financial advisors, wealth managers, and professionals seeking to enhance their expertise in estate planning as part of holistic financial solutions.

COURSE OUTLINE

Day 1: Introduction to Estate Planning and Legal Framework

- Definition and objectives of estate planning.
- Overview of the law of succession (Intestate Succession Act and Wills Act).
- Key role players: executor, trustee, beneficiary, heir.
- Components of an estate: assets, liabilities, and liquidity.
- Introduction to estate duty and capital gains tax implications.
- Ethical considerations and professional conduct for estate planners.

Day 2: Wills, Trusts, and Estate Administration

- Formal requirements for a valid will.
- Revocation, amendment, and codicils.
- Executor appointment, duties, and powers.
- Steps in estate administration: reporting, inventory, liquidation, distribution.
- Types of trusts: ownership, bewind, and discretionary.
- Trust creation, funding, and management.
- Case studies on will and trust scenarios.

Day 3: Tax Implications and Estate Planning Strategies

- Estate duty: calculation, exemptions, and deductions.
- Section 4(q) abatement and the surviving spouse rebate.
- Capital gains tax: primary residence exclusion, rollover relief.
- Life insurance: ownership, cession, and policy types.
- Retirement fund death benefits: nomination and allocation.
- Business succession planning: buy-and-sell agreements, shareholding.
- Donations inter vivos and their tax implications.

Day 4: Advanced Planning for Special Circumstances

- Guardianship and testamentary trusts for minors.
- Special trusts for persons with disabilities.
- International estate planning: conflict of laws, foreign wills.
- Estate planning for non-residents and foreign assets.
- Charitable foundations and bequests.
- Digital legacy: passwords, online accounts, cryptocurrencies.
- Antenuptial contracts and community of property.
- Case studies: blended families, unmarried partners.

Day 5: Integrated Planning, Compliance, and Case Studies

- Comprehensive estate planning process: fact find, analysis, recommendations.
- Documenting the estate plan: wills, trust deeds, powers of attorney.
- Compliance with FICA, FAIS, and POPIA.
- Review of key legislation: Estate Duty Act, Income Tax Act.
- Ethical issues: conflicts of interest, confidentiality.
- Group case study: develop a full estate plan for a hypothetical client.
- Final assessment preparation and Q&A.;

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

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 24,200.00	R 24,200.00
1	In-House	R 31,400.00	R 31,400.00
1	On-Campus (Pretoria)	R 36,200.00	R 36,200.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	14 Aug 2026	On-Campus	Durban, South Africa
10 Aug 2026	14 Aug 2026	On-Campus	Abu Dhabi, UAE
10 Aug 2026	14 Aug 2026	On-Campus	Pretoria, South Africa
10 Aug 2026	14 Aug 2026	On-Campus	Dubai, UAE
10 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
10 Aug 2026	14 Aug 2026	On-Campus	Mauritius
17 Aug 2026	21 Aug 2026	On-Campus	Dubai, UAE
17 Aug 2026	21 Aug 2026	On-Campus	Pretoria, 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 242603) 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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