



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 Rules Development and Compliance

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

Unit Standard 242611 · NQF Level 5 · 3 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the skills to develop retirement fund rules that are tailored to the needs of clients while ensuring full compliance with South African regulatory requirements. Participants will learn to draft, review, and implement fund rules that balance member benefits with legal obligations, fostering trust and operational efficiency.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242611
Accreditation	SAQA Accredited · NQF Level 5 · 3 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Analyze the needs of a retirement fund client to identify key rule requirements.
- Design a set of retirement fund rules that align with client objectives and regulatory frameworks.
- Evaluate existing fund rules for compliance with the Pension Funds Act and other relevant legislation.
- Implement procedures to ensure ongoing compliance and governance of fund rules.
- Demonstrate the ability to communicate rule changes effectively to stakeholders.
- Apply risk management principles to mitigate potential legal and financial exposures.

WHO SHOULD ATTEND

- This course is designed for retirement fund administrators, consultants, legal advisors, and compliance officers who are involved in drafting or reviewing fund rules for pension, provident, and retirement annuity funds.

COURSE OUTLINE

Day 1: Fundamentals of Retirement Fund Rules and Compliance

- Overview of the South African retirement fund landscape
- Legal framework: Pension Funds Act, Income Tax Act, and regulations
- Key elements of fund rules: membership, contributions, benefits, and governance
- Compliance obligations: reporting, disclosure, and fiduciary duties
- Rule amendment procedures and approval by the Financial Sector Conduct Authority (FSCA)
- Case study: common compliance pitfalls and remedies
- Practical exercise: drafting a simple fund rule clause

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 **3 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
07 Aug 2026	07 Aug 2026	On-Campus	Dubai, UAE
10 Aug 2026	10 Aug 2026	On-Campus	Abu Dhabi, UAE
11 Aug 2026	11 Aug 2026	On-Campus	Durban, South Africa
11 Aug 2026	11 Aug 2026	On-Campus	Mauritius
12 Aug 2026	12 Aug 2026	On-Campus	Cape Town, South Africa
13 Aug 2026	13 Aug 2026	On-Campus	Dubai, UAE
14 Aug 2026	14 Aug 2026	On-Campus	Pretoria, South Africa
17 Aug 2026	17 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 242611) 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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