Accredited Africa Training Institute for Capacity Development
Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa
Tel: +27 12 004 8389 · Mobile: +27 65 077 6310
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COURSE BROCHURE

Disability Insurance Solutions in Financial Planning

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

Unit Standard 243131 · NQF Level 4 · 4 Credits · 1 Day

COURSE OVERVIEW

This course equips financial planners with comprehensive knowledge of disability insurance solutions, enabling them to integrate these products into holistic financial plans. Participants will learn to assess client needs, evaluate policy features, and recommend appropriate disability cover to mitigate income risk.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	243131
Accreditation	SAQA Accredited · NQF Level 4 · 4 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS — verifiable online

LEARNING OUTCOMES

- Analyse the role of disability insurance in mitigating income risk within a financial plan.
- Evaluate different types of disability insurance products and their policy features.
- Apply underwriting principles to assess client eligibility and risk.
- Calculate appropriate disability cover amounts based on client needs and affordability.
- Integrate disability insurance solutions into a comprehensive financial plan.
- Demonstrate compliance with relevant legislation and industry codes of practice.

WHO SHOULD ATTEND

- Financial advisors, insurance brokers, and financial planning professionals seeking to deepen their expertise in disability insurance within the context of comprehensive financial planning.

COURSE OUTLINE

Day 1: **Foundations of Disability Insurance in Financial Planning**

- Introduction to disability insurance and its importance.
- Types of disability cover: lump sum, income replacement, overhead expense.
- Key product features: waiting periods, benefit periods, definition of disability.
- Client needs analysis and risk assessment.
- Regulatory framework: FAIS, TCF, and SAQA requirements.
- Ethical considerations and disclosure obligations.
- Case study: matching products to client scenarios.
- Integrating disability insurance into a holistic financial plan.

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 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 9,400.00	**R 9,400.00**
1	In-House	R 12,700.00	**R 12,700.00**
1	On-Campus (Pretoria)	R 14,100.00	**R 14,100.00**

UPCOMING SESSIONS

Start	End	Method	Venue
02 Dec 2026	02 Dec 2026	On-Campus	Dar es Salaam, Tanzania
03 Dec 2026	03 Dec 2026	On-Campus	Shenzhen, China
04 Dec 2026	04 Dec 2026	On-Campus	Mauritius
07 Dec 2026	07 Dec 2026	On-Campus	Abu Dhabi, UAE
07 Dec 2026	07 Dec 2026	On-Campus	Bangkok, Thailand
08 Dec 2026	08 Dec 2026	Online	—
08 Dec 2026	08 Dec 2026	On-Campus	Nairobi, Kenya
09 Dec 2026	09 Dec 2026	On-Campus	Johannesburg, South Africa

Contact us if no suitable date is listed — on-demand sessions can be arranged for groups.

HOW TO GET A QUOTATION OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 243131) and click **Get A Quotation**. 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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