



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

Email: apply@aatikd.co.za · Website: www.aatikd.co.za

COURSE BROCHURE

Income Tax Act for Long-Term Insurance and Investments

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

Unit Standard 243132 · NQF Level 4 · 2 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with a comprehensive understanding of the Income Tax Act (58 of 1962) and its regulations as they apply to long-term insurance and investment products. Participants will gain the ability to interpret tax provisions, calculate tax implications, and ensure compliance within the South African financial services context.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	243132
Accreditation	SAQA Accredited · NQF Level 4 · 2 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Demonstrate knowledge of the key provisions of the Income Tax Act (58 of 1962) relevant to long-term insurance and investment products.
- Apply tax principles to calculate the tax implications of various long-term insurance policies and investment vehicles.
- Analyze the impact of tax regulations on product design, marketing, and client advice.
- Evaluate compliance requirements for long-term insurance and investment products under the Act.
- Interpret amendments to the Income Tax Act and assess their effect on existing and new products.
- Implement tax-efficient strategies for long-term insurance and investment planning.

WHO SHOULD ATTEND

- This course is designed for financial advisors, insurance brokers, investment consultants, tax practitioners, and compliance officers who work with long-term insurance and investment products.
- It is also suitable for professionals seeking to deepen their knowledge of tax legislation in the financial services sector.

COURSE OUTLINE

Day 1: Income Tax Act Provisions for Long-Term Insurance and Investments

- Overview of the Income Tax Act and its relevance to long-term insurance and investments.
- Definition and classification of long-term insurance policies (e.g., life, disability, critical illness).
- Tax treatment of premiums: deductibility and non-deductibility.
- Taxation of policy benefits: lump sums, annuities, and death benefits.
- Section 11(w) and other deductions for insurers.
- Retirement annuity funds: contribution limits and tax-free portions.
- Endowment policies and the 4-fund approach.
- Key compliance and reporting obligations for insurers.

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 **2 NQF credits** at **NQF Level 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 12,800.00	R 12,800.00
1	In-House	R 16,600.00	R 16,600.00
1	On-Campus (Pretoria)	R 19,200.00	R 19,200.00

UPCOMING SESSIONS

Start	End	Method	Venue
11 Aug 2026	11 Aug 2026	On-Campus	Pretoria, South Africa
12 Aug 2026	12 Aug 2026	On-Campus	Abu Dhabi, UAE
13 Aug 2026	13 Aug 2026	On-Campus	Durban, South Africa
13 Aug 2026	13 Aug 2026	On-Campus	Mauritius
14 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
17 Aug 2026	17 Aug 2026	On-Campus	Pretoria, South Africa
18 Aug 2026	18 Aug 2026	On-Campus	Abu Dhabi, UAE
19 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 243132) 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.

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 · WhatsApp: +27 65 077 6310 · apply@aaticd.co.za · www.aaticd.co.za