



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

Wealth Management Options Investigation

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

Unit Standard 243134 · NQF Level 4 · 5 Credits · 2 Days

COURSE OVERVIEW

This course equips learners with the skills to investigate and evaluate the range of wealth management options available in the South African financial landscape. Participants will learn to analyze investment vehicles, risk profiles, and regulatory frameworks to make informed recommendations. The course aligns with the SAQA unit standard 243134, ensuring a comprehensive understanding of wealth management principles.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	243134
Accreditation	SAQA Accredited · NQF Level 4 · 5 Credits
Duration	2 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Analyze the range of wealth management options, including unit trusts, retirement annuities, endowments, and offshore investments.
- Evaluate the risks and returns associated with different wealth management vehicles based on client profiles.
- Apply relevant legislation and regulatory requirements, such as FAIS and the Pension Funds Act, to wealth management advice.
- Demonstrate the ability to compare and contrast investment strategies, including growth, income, and preservation approaches.
- Design a basic wealth management plan that aligns with client goals, time horizons, and risk tolerance.

WHO SHOULD ATTEND

- This course is designed for financial advisors, investment consultants, and professionals in the banking and insurance sectors who wish to deepen their knowledge of wealth management options.
- It is also suitable for individuals seeking to enhance their personal financial planning capabilities.

COURSE OUTLINE

Day 1: Foundations of Wealth Management and Investment Options

- Introduction to wealth management: goals, scope, and the financial planning cycle.
- Overview of investment options: equities, bonds, money market, property, and alternative investments.
- Risk and return fundamentals: measuring risk, diversification, and the risk-free rate.
- Tax implications for investors: income tax, capital gains tax, and tax-efficient investments.
- Client profiling: risk tolerance, investment horizon, and liquidity needs.
- Regulatory framework: FSCA, FAIS, and the role of the financial advisor.
- Ethical considerations and disclosure requirements.
- Case study: matching a client profile to suitable investment options.

Day 2: Advanced Investment Strategies and Practical Application

- Collective investment schemes: unit trusts, exchange-traded funds (ETFs), and hedge funds.
- Retirement planning: retirement annuities, pension funds, and living annuities.
- Structured products and guaranteed investments.
- Fee structures: initial fees, annual management charges, performance fees, and total expense ratios.
- Portfolio construction: asset allocation, security selection, and rebalancing strategies.
- Performance measurement: benchmarks, time-weighted return, and risk-adjusted return.
- Review and monitoring: client reviews, market changes, and regulatory updates.
- Presentation skills: communicating recommendations clearly and ethically.

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 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 15,400.00	R 15,400.00
1	In-House	R 20,000.00	R 20,000.00
1	On-Campus (Pretoria)	R 23,100.00	R 23,100.00

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 243134) 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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