



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

Pre and Post Retirement Planning Essentials

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

Unit Standard 243136 · NQF Level 4 · 3 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the knowledge and skills to effectively plan for both pre- and post-retirement phases. It covers key aspects such as financial planning, legal considerations, and lifestyle adjustments, enabling individuals to make informed decisions for a secure retirement.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	243136
Accreditation	SAQA Accredited · NQF Level 4 · 3 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Describe the main aspects of pre-retirement planning, including financial, legal, and lifestyle considerations.
- Explain the key elements of post-retirement planning, such as income management, healthcare, and estate planning.
- Apply strategies to assess retirement readiness and identify potential gaps in planning.
- Analyze the impact of inflation, investment returns, and longevity on retirement funds.
- Evaluate different retirement income options, including annuities, pensions, and drawdown strategies.
- Demonstrate an understanding of tax implications and legal requirements related to retirement planning.

WHO SHOULD ATTEND

- This course is designed for employees approaching retirement, financial advisors, HR professionals, and anyone seeking to understand the essentials of retirement planning.

COURSE OUTLINE

Day 1: Foundations of Pre- and Post-Retirement Planning

- Overview of retirement planning: pre- and post-retirement phases.
- Legal and regulatory framework in South Africa (e.g., Pension Funds Act, tax implications).
- Financial instruments: retirement annuities, provident funds, and preservation funds.
- Lifestyle and health considerations: medical aid, estate planning, and wills.
- Post-retirement income: annuities, living annuities, and drawdown strategies.
- Risk management: inflation, longevity, and market volatility.
- Estate planning: testamentary trusts, beneficiaries, and executor appointments.
- Creating a personalised retirement plan: practical steps and tools.

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 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
10 Aug 2026	10 Aug 2026	On-Campus	Dubai, UAE
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

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 243136) 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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