



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

Dread Disease Products in Wealth Management

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

Unit Standard 243139 · NQF Level 4 · 2 Credits · 1 Day

COURSE OVERVIEW

This course equips financial advisors and wealth managers with the expertise to critically evaluate dread disease products and integrate them into comprehensive wealth management strategies. Participants will learn to assess product features, tax implications, and risk mitigation roles, enabling them to advise high-net-worth clients effectively.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	243139
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

- Analyse the structure, benefits, and limitations of various dread disease products available in the South African market.
- Evaluate the role of dread disease cover in preserving wealth and mitigating financial risk during critical illness.
- Apply tax and estate planning principles to dread disease products to optimize client outcomes.
- Design integrated wealth management strategies that incorporate dread disease insurance alongside other investment and protection vehicles.
- Demonstrate the ability to present and justify dread disease product recommendations to clients with diverse financial profiles.

WHO SHOULD ATTEND

- Financial advisors, wealth managers, and insurance consultants seeking to deepen their understanding of dread disease insurance within holistic financial planning.

COURSE OUTLINE

Day 1: Dread Disease Products in Wealth Management

- Introduction to dread disease products and their purpose in wealth management.
- Key product features: covered conditions, benefit structures, waiting periods, and exclusions.
- Underwriting principles and risk assessment for dread disease cover.
- Needs analysis: identifying client vulnerability and suitable benefit levels.
- Integration with other wealth management tools: life insurance, disability cover, and investments.
- Tax implications and estate planning considerations for dread disease payouts.
- Regulatory framework: FAIS, policyholder protection rules, and Treating Customers Fairly (TCF).
- Case studies: applying product knowledge to real-world client scenarios.

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	Dubai, UAE
12 Aug 2026	12 Aug 2026	On-Campus	Pretoria, South Africa
13 Aug 2026	13 Aug 2026	On-Campus	Abu Dhabi, UAE
14 Aug 2026	14 Aug 2026	On-Campus	Durban, South Africa
14 Aug 2026	14 Aug 2026	On-Campus	Mauritius
17 Aug 2026	17 Aug 2026	On-Campus	Harare, Zimbabwe
17 Aug 2026	17 Aug 2026	On-Campus	Dubai, UAE
18 Aug 2026	18 Aug 2026	On-Campus	Pretoria, 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 243139) 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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