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

Electronic Financial Solution Proposal Skills

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

Unit Standard 243143 · NQF Level 4 · 3 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the skills to use an electronic system to propose a financial solution. Participants will learn to analyze financial data, structure proposals, and present solutions using appropriate software tools. The course ensures compliance with organizational and regulatory standards in a digital environment.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	243143
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

- Analyze financial data using an electronic system to identify client needs and potential solutions.
- Design a financial solution proposal that aligns with organizational policies and regulatory requirements.
- Implement electronic system features to structure, format, and present the proposal effectively.
- Evaluate the proposed financial solution against predefined criteria and client objectives.
- Demonstrate the ability to store and retrieve proposals in an electronic system for future reference.

WHO SHOULD ATTEND

- Financial advisors, accountants, and business professionals who need to prepare and present financial solution proposals using electronic systems.

COURSE OUTLINE

Day 1: **Fundamentals of Electronic Financial Solution Proposals**

- Introduction to electronic financial solutions: types, benefits, and market trends.
- Regulatory environment: FAIS, FICA, POPIA, and industry codes of conduct.
- Needs analysis techniques for corporate and retail clients.
- Proposal structure: executive summary, solution description, pricing, terms, and conditions.
- Value proposition development and differentiation strategies.
- Risk identification and mitigation in electronic financial proposals.
- Cost-benefit analysis and return on investment calculations.
- Ethical considerations and disclosure requirements.

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 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 243143) 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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