



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@aaticd.co.za · Website: www.aaticd.co.za

COURSE BROCHURE

Financial Management for Unit Managers

Business, Commerce and Management Studies / Generic Management

Unit Standard 252040 · NQF Level 5 · 8 Credits · 5 Days

COURSE OVERVIEW

This course equips unit managers with the financial skills necessary to effectively manage the finances of a unit. Learners will gain the competence to interpret financial statements, prepare budgets, monitor expenditure, and apply financial controls in accordance with organisational policies and procedures.

Category	Business, Commerce and Management Studies
Subfield	Generic Management
Unit Standard	252040
Accreditation	SAQA Accredited · NQF Level 5 · 8 Credits
Duration	5 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply principles of financial management to ensure effective control of unit finances.
- Analyse financial statements to evaluate the financial performance of a unit.
- Prepare and present a budget for a unit based on operational requirements.
- Monitor actual expenditure against budget and implement corrective actions.
- Demonstrate understanding of internal financial controls and their application.
- Evaluate financial decisions and their impact on the unit's objectives.

WHO SHOULD ATTEND

- This course is designed for unit managers, team leaders, and supervisors in any sector who are responsible for managing the finances of their unit or department.

COURSE OUTLINE

Day 1: Introduction to Financial Management and Budgeting Basics

- Overview of financial management for unit managers
- Key financial terms: revenue, expenses, profit, cash flow
- Importance of financial accountability
- Types of budgets: operational, capital, cash flow
- Steps in the budgeting process
- Roles and responsibilities in budgeting
- Introduction to financial policies and procedures
- Ethical considerations in financial management

Day 2: Budget Preparation and Planning

- Cost classification: fixed, variable, direct, indirect
- Historical data analysis for budget preparation
- Zero-based budgeting vs incremental budgeting
- Developing budget assumptions
- Allocating resources effectively
- Budget templates and tools
- Involving team members in budget planning
- Documenting the budget proposal

Day 3: Monitoring and Controlling Expenditure

- Variance analysis: favourable vs unfavourable
- Reporting actual vs budgeted figures
- Tools for monitoring expenditure: spreadsheets, software
- Cost control techniques
- Authorisation and approval processes
- Managing unexpected expenses
- Communicating financial performance to stakeholders
- Continuous improvement in cost management

Day 4: Financial Reporting and Analysis

- Understanding the income statement
- Understanding the balance sheet
- Understanding the cash flow statement
- Key financial ratios: profitability, liquidity, efficiency
- Trend analysis and benchmarking
- Preparing management reports
- Presenting financial information effectively
- Using financial analysis to improve unit performance

Day 5: Strategic Financial Management and Integration

- Linking financial management to strategic goals
- Capital budgeting and investment appraisal
- Cost-benefit analysis techniques
- Risk management in financial planning
- Ethical dilemmas in financial management

- Developing a financial improvement plan
- Review of course learning and application
- Assessment and certification 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 **8 NQF credits** at **NQF Level 5**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 24,200.00	R 24,200.00
1	In-House	R 31,400.00	R 31,400.00
1	On-Campus (Pretoria)	R 36,200.00	R 36,200.00

UPCOMING SESSIONS

Start	End	Method	Venue
03 Aug 2026	07 Aug 2026	On-Campus	Pretoria, South Africa
03 Aug 2026	07 Aug 2026	On-Campus	Dubai, UAE
03 Aug 2026	07 Aug 2026	On-Campus	Cape Town, South Africa
03 Aug 2026	07 Aug 2026	On-Campus	Mauritius
03 Aug 2026	07 Aug 2026	On-Campus	Johannesburg, South Africa
03 Aug 2026	07 Aug 2026	On-Campus	Lagos, Nigeria
10 Aug 2026	14 Aug 2026	On-Campus	Mauritius
10 Aug 2026	14 Aug 2026	On-Campus	Cape Town, 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 252040) 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