



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

Customer Advice for Optimal Choice and Benefits

Services / Wholesale and Retail

Unit Standard 259898 · NQF Level 4 · 7 Credits · 4 Days

COURSE OVERVIEW

This course equips customer-facing professionals with the skills to provide tailored advice that enables clients to optimise their choices and maximise benefits. Participants will learn to assess customer needs, evaluate product or service options, and communicate recommendations effectively, ensuring informed decision-making and enhanced customer satisfaction.

Category	Services
Subfield	Wholesale and Retail
Unit Standard	259898
Accreditation	SAQA Accredited · NQF Level 4 · 7 Credits
Duration	4 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Analyse customer needs and preferences to identify suitable options.
- Evaluate the features and benefits of available choices against customer requirements.
- Apply communication techniques to present recommendations clearly and persuasively.
- Demonstrate the ability to handle objections and provide additional information to support customer decisions.
- Implement follow-up strategies to confirm customer satisfaction and optimise future choices.

WHO SHOULD ATTEND

- This course is designed for customer service representatives, sales consultants, account managers, and any professionals who interact with customers and are responsible for advising them on product or service choices.

COURSE OUTLINE

Day 1: Understanding Customer Needs and the Regulatory Framework

- Introduction to customer advice and its significance
- Overview of the Financial Advisory and Intermediary Services (FAIS) Act
- Code of Conduct for financial advisors
- Customer needs analysis and profiling
- Ethical considerations in customer advice
- The advice process: from inquiry to recommendation
- Documentation and record-keeping requirements

Day 2: Product Knowledge and Suitability Assessment

- Types of financial products: insurance, investments, retirement annuities
- Product features, benefits, and drawbacks
- Risk tolerance assessment methods
- Matching products to customer life stages and goals
- Cost implications and fee structures
- Suitability reports and recommendations
- Case studies on product selection

Day 3: Communication Skills and Presenting Advice

- Active listening and questioning skills
- Explaining complex financial concepts simply
- Use of visual aids and examples
- Managing difficult conversations
- Obtaining and documenting informed consent
- Record of advice and disclosure requirements
- Role-play exercises on presenting advice

Day 4: Implementation, Review, and Compliance

- Implementing customer instructions and product applications
- Post-sale service and customer support
- Review cycles and triggers for advice updates
- Complaints handling and dispute resolution
- Regulatory reporting and audit trails
- Continuous professional development (CPD)
- Final assessment and course wrap-up

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 **7 NQF credits** at **NQF Level 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 20,500.00	R 20,500.00
1	In-House	R 26,600.00	R 26,600.00
1	On-Campus (Pretoria)	R 30,800.00	R 30,800.00

UPCOMING SESSIONS

Start	End	Method	Venue
03 Aug 2026	06 Aug 2026	On-Campus	Pretoria, South Africa
03 Aug 2026	06 Aug 2026	On-Campus	Dubai, UAE
03 Aug 2026	06 Aug 2026	On-Campus	Cape Town, South Africa
03 Aug 2026	06 Aug 2026	On-Campus	Mauritius
03 Aug 2026	06 Aug 2026	On-Campus	Johannesburg, South Africa
03 Aug 2026	06 Aug 2026	On-Campus	Lagos, Nigeria
11 Aug 2026	14 Aug 2026	On-Campus	Mauritius
11 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 259898) 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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