



## WHO would benefit from this programme?

This qualification in Wealth Management, it provides a framework for learners to develop competencies related to the Long Term Insurance Sub-Sector, which includes Life Benefits, Retirement Funds and Medical Scheme Administration, as well as the Collective Investment Sub-Sector, Wealth Creation and Wealth Management. It provides a balanced learning experience and an opportunity for learners to apply academic skills in relation to the workplace. The Qualification is structured in such a way that it exposes learners to generic competencies required in the Financial Services Sector at Level 5 and allows for specialisation to meet the needs of different work roles.

### Programme Structure

The Curriculum is aligned to the National Certificate in Wealth Management 57608 with a total credit value of 120 credits. The Programme consists of Fundamentals – 39 credits core -40 credits and electives – 41 credits which may vary based on the individual learners' needs and is available in 30 credit skill blocks. The programme is presented by way of lectures, group discussions, case studies and role plays and delivered at NQF level 5.

### Assessment of Participants

Assessment is both formative and Summative and includes:

- Individual Group Exercises & Tasks
- Open and Closed Book Case Study integrative assessments
- complete this programme successfully, and be awarded a certificate, learners must be found competent in all aspects of the summative assessment according to the requirements listed in the relevant student handbook.

### Learning Solutions

- Learnerships & Skills Programmes
- Face to Face Facilitated Learning
- E-Learning Courses
- Distance Learning
- Traditional Paper-Based Course Manuals
- Rich-Media Presentations
- Webinar Workshops

### Occupational Group

- The Qualification has relevance for learners in Retirement Funds and Medical Schemes, Intermediaries including, but not limited to, Financial Advisors, Personal Financial Planners, Financial Services Call Centre Agents, Client Service Providers, Brokers, Broker Consultants, Retirement Fund Consultants, Retirement Fund Administrators, Trust Fund Officers, Product Developers, Consultants who advise on product structure of Retirement Funds, Principal Officers, Trustees, Medical Scheme Consultants, Senior Administrators, Retail Managers who support Advisors and have a back office function, Collective Investment Scheme Managers, Account Executives and Compliance Officers. Choose this programme to.
- Interpreting current affairs and their influence on insurance.
- Managing personal finances and risk in a work environment.
- Operating a computer for business purposes.
- Understanding the nature and scope of Short Term insurance.
- Understanding the nature and scope of Long-Term insurance.
- Applying knowledge of legislation, ethics and compliance in a Retail Insurance environment.
- Applying skills of customer care to build a professional relationship with a client.

### Admission requirements

The minimum entry requirements for admission are:

- Learners should have at least a Level 4 Qualification. It is preferable that learners should first complete one of the Long-Term Insurance or Wealth Management Qualifications at NQF Level 4 before accessing this Qualification.
- Articulation:** As this is a Level 5 Qualification it should provide the learner with access to any Qualification at Level 6 Management Development Program.
- Exemption:** This qualification is generic for categories 1.1 to 1.20, no exemption granted
- Recognition of Prior Learning:** YES