TRAINING FORCE
Linking Training to Industry

OCCUPATIONAL CERTIFICATE: LONG TERM INSURANCE ADVISOR
(SAQA ID: 105022)

Qualification Title: Occupational Certificate
Insurance Advisor

SAQA Qualification ID
105022

NQF Level
Level 5

Total Credits
180

Duration
12 Months

Training Days
16 Days spread over 12 Months

Blended
Online with Face to face/remote contact sessions

Assessment Quality Partner
INSETA

Purpose of the qualification

The purpose of this qualification is to prepare a learner to work as a Long Term Insurance Advisor.

Target Audience

The qualification is relevant for learners in Retirement Funds, Investment, Medical Schemes and Intermediaries (Range: includes 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 S cheme Managers, Account Executives and Compliance Officers).

Entry Requirements

Grade 12 with English Communication (NQF Level 4).

Course Structure

Part 1
Theory Modules
Runs with Part 2
|
Theory Exam

Part 2
Practical Modules
Runs with Part 2
|
Workbook, Observation & Assessment

Part 3
Workplace Modules
External or Onsite
|
Observation & Logbook

External Integrated Summative Assessment EISA

1. Knowledge Modules(46 Credits).

MODULE ID	Title	NQF Level	Credits
KM-01	Overview of the Investment Advisory Industry.	5	13
KM-02	Regulatory requirements for advising clients regarding insurance and investments.	5	17

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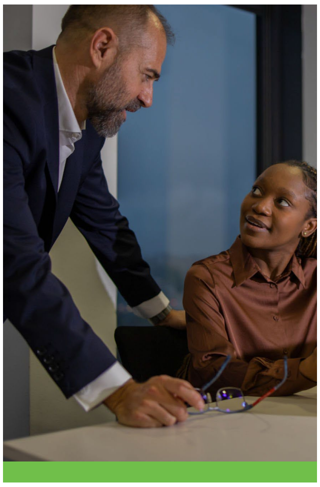

KM-03	Principles of Providing advice to clients regarding Insurance, Savings and Retirement Planning.	5	16

2. Practical Skill Modules(84 Credits).

MODULE ID	Title	NQF Level	Credits
PM-01	Analyse clients' long-term wealth creation/ protection needs.	5	31
PM-02	Evaluate available long-term wealth creation/ protection options.	5	27
PM-03	Recommend and implement the most appropriate wealth creation/protection options.	5	26

3. Work Experience Modules(50 Credits).

MODULE ID	Title	NQF Level	Credits
WM-01	Participate in the processes of wealth creation.	5	50

Course Outcome

- Provide advice to clients regarding the use of Long Term Insurance to manage risks and protect wealth.

Assessment Methods

- **Internal Assessments:** Learners will be assessed through practical demonstrations, role-playing scenarios, and written tests covering all knowledge and practical skill modules.
- **Workplace Evidence:** Learners must provide documentary evidence of their practical work, signed off by supervisors, to demonstrate competence in real-world settings.

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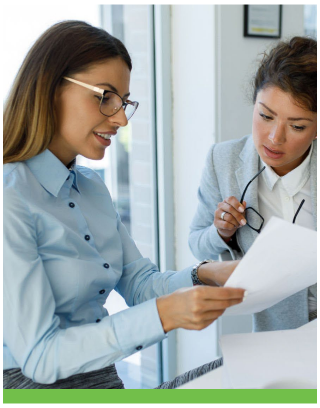

- **Final Integrated Summative Assessment:** A final assessment to evaluate the learner's comprehensive understanding and application of the course material.

Certification

- **Occupational Certificate:** Long Term Insurance Advisor certificate awarded by the QCTO upon successful completion of the EISA.

Articulation Options

Horizontal Articulation

- **Occupational Certificate:** Employee and Pension Fund Benefit Advisor, Level 5, 110 Credits.
- **Occupational Certificate:** Health Care Benefits Advisor, Level 5, 102 Credits.

Vertical Articulation

- **Occupational Certificate:** Investment Advisor, Level 6, 515 Credits.
- **Occupational Certificate:** Financial Advisor, Level 6, 213 Credits.

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For more information on how your organisation can benefit, contact Training Force:

011 974 6633 info@trainingforce.co.za www.trainingforce.co.za