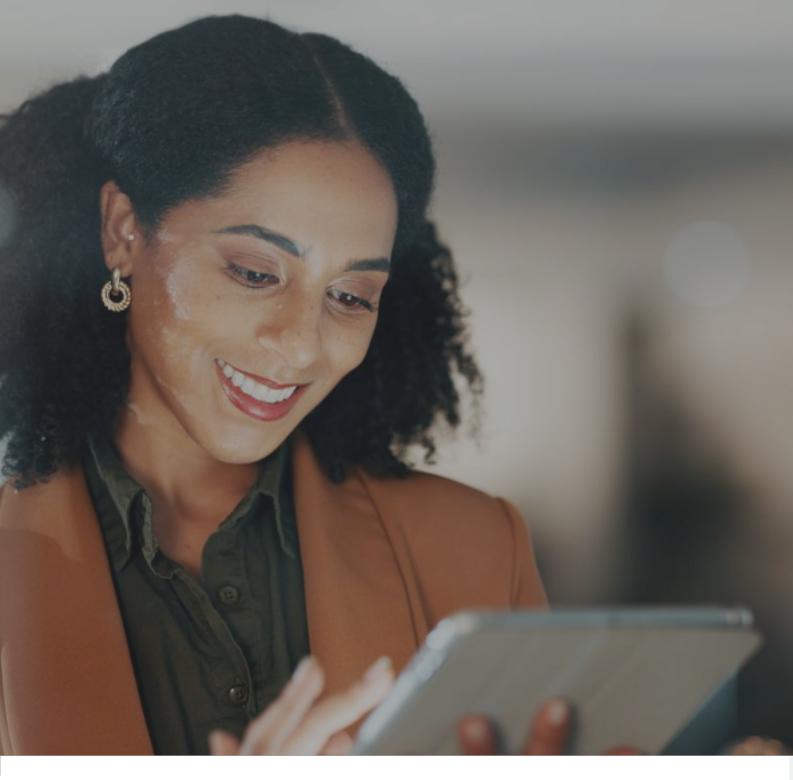


ifundi
Future Ready

Occupational Certificate:

EMPLOYEE AND PENSION FUND BENEFIT ADVISER

NQF: 5 SAQA ID 105025 CREDIT: 110

Description

This qualification is designed to cater for the development of new entrants and the further specialization of employees in the financial services industry. It equips learners with advice on Employee Benefits, Retirement Funds, Health Care Benefits, and Investment Strategies, helping clients grow and protect their wealth. Employee and Pension Fund Benefit Advisers offer guidance to organisations on selecting and implementing appropriate pension and employee benefits products and systems.

Career Fields

With this qualification, successful learners could pursue a career as a:

- Financial Advisors
- Personal Financial Planner
- Financial Service Call Centre Agent
- Client Service Provider
- Broker
- Broker Consultant
- Retirement Fund Consultant
- Retirement Fund Administrator
- Trust Fund Officer
- Product Development

Programme Outline

Knowledge Modules

- Overview of the Investment Advisory Industry
- Regulatory Requirements for Advising Clients on Insurance and Investment
- Principles of Providing Advice on Employee and Pension Fund Benefits

Practical Skill Modules

- Analyze Client Organizations' Needs Related to Retirement Funds and Employee Benefits
- Evaluate Available Employee Benefit and Retirement Fund Options and Structures
- Advise Clients on Structuring the Most Appropriate Retirement Funds and Employee Benefits

Work Experience Modules

- Support the Provision of Advice on Employee Benefits and Retirement Structures

Type of programme

This programme is offered in blended and online formats with live facilitation over a one-year period. Programme rollout formats include block release and a part-time schedule for working people.

Admission requirements

The minimum entry requirement for this qualification is:

- Any NQF Level 4 qualification with communication

Integrated assessment

During the programme's rollout, formative and summative assessments will be conducted. Learners are also required to complete a Final Integrated Summative Assessment (FISA). Upon successful completion of the FISA, learners will receive a Statement of Results (SOR) from iFundi. This SOR is the entry requirement for undertaking the External Integrated Summative Assessment (EISA).

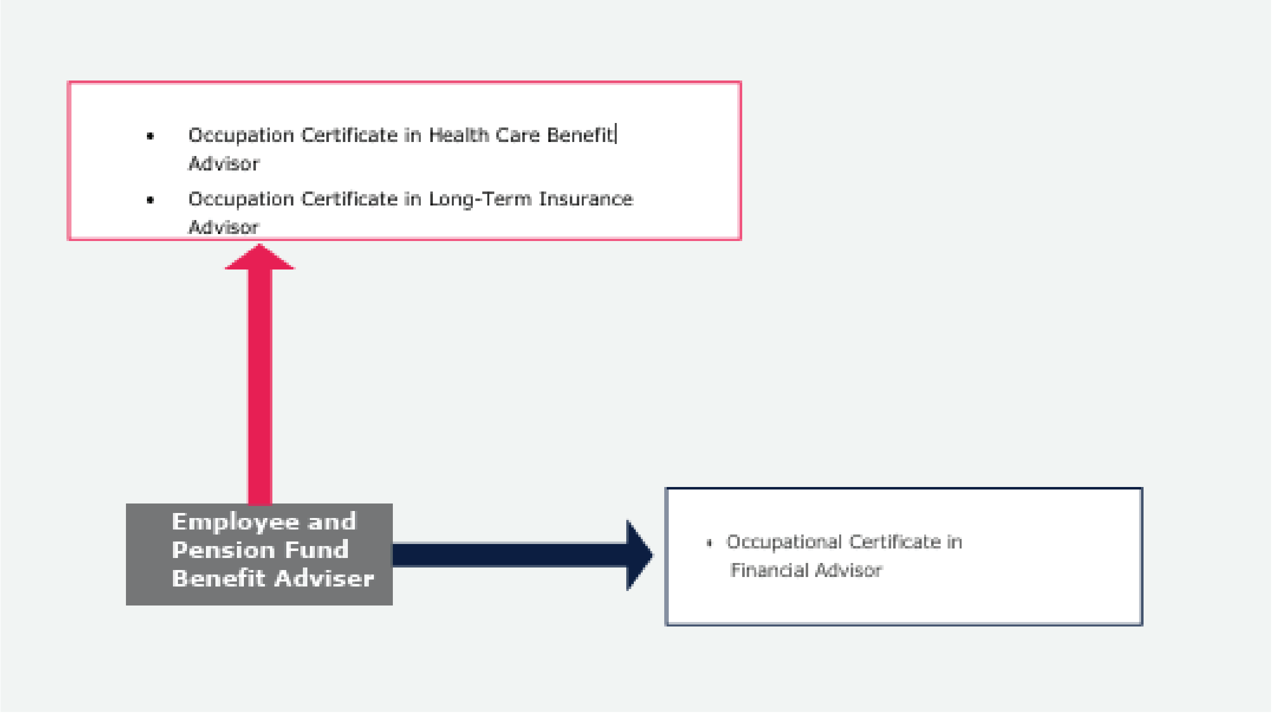
EISA is a single, national assessment which leads to competent learners being awarded Occupational Certificates. It is an integral and critical component of QCTO's quality assurance system, as it ensures that the assessment of occupational qualifications, part-qualifications and trades is standardised, consistent and credible. Qualifying for External Assessment: To qualify for an external assessment, learners must provide proof of completion of all required knowledge and practical modules by means of statements of results and a record of completed work experience.

Articulation

This qualification provides opportunities for horizontal and vertical articulation options.

Horizontal Articulation
Occupation Certificate in Health Care Benefits Advisor
Occupation Certificate in Long-Term Insurance Advisor

Articulation:
Occupational Certificate in Financial Advisor



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