

**SERVICE OFFERING BY
PSG KONSULT ACADEMY
TO PSG CORPORATE ON THE QUALIFICATION:**

***NATIONAL CERTIFICATE IN WEALTH MANAGEMENT: NQF LEVEL 5
(Focused on Medical Aid Outcomes)***

1. INTRODUCTION

- 1.1 The **NATIONAL CERTIFICATE IN WEALTH MANAGEMENT: NQF LEVEL 5 (focused on Medical Aid Outcomes)** has been designed to equip Learners with the knowledge and skills to function effectively in our unique South African environment. However, since this environment is changing so fast, the focus is not only on present but also on future realities.
- 1.2 The content of the Qualification is continually adjusted towards the Unit Standards to provide for changing realities. These Unit Standards are based on the **NEW QUALIFICATION**.
- 1.3 PSG Konsult Academy (PSG) together with the University of Stellenbosch Business School Executive Development (USB-ED) is a full accredited provider of training with INSETA.

PSG has also successfully trained more than 6 000 Brokers, Marketers and Administrative people.

2. OBJECTIVES

- 2.1 The overall theme of the Qualification is to achieve and sustain trend-setting performance through high quality fundamental, core and elective learning and a keen understanding of the functional aspects of administration in the insurance industry.
- 2.2 To achieve this, we strive towards the following objectives:
 - Insurance Administration training and development of world-class standards in support of business objectives.
 - Balanced training including facilitator-led, case studies, discussions, networking, etc i.e. different methodologies.
 - An action learning approach, emphasizing skills development and on the job application of learning.
 - A national accredited qualification.
 - Enhance their capacity for personal change and implementation of change
 - Develop a market orientation
 - Develop their ability to develop the intellectual capital of their reports.

3. STRUCTURE OF THE QUALIFICATION

In order to offer participants the maximum learning experience, the qualification has been divided into four study schools.

This curriculum can be further altered to your specific needs:

Study School 1

CODE	UNIT STANDARD TITLE		NQF Level	Credits
242568	Apply knowledge and insight of the medical scheme environment to evaluate risk in the selected medical scheme	E	6	4
242582	Analyse the implications of the South African Government's National Health Policy and the potential impact on medical schemes	E	6	10
242573	Determine the needs and wants of an entity in order to propose an appropriate financial solution.	C	5	4
230077	Describe the financial lifecycle of an individual and how this influences financial decisions.	F	5	8
230071	Apply basic economic principles to the financial services sector.	F	5	5
	TOTAL			31

Study School 2

CODE	UNIT STANDARD TITLE		NQF Level	Credits
242554	Research information in order to assist in conducting a financial risk assessment.	C	5	7
242574	Present a proposal to optimise the tax aspects of the wealth management of an entity.	C	5	4
119997	Demonstrate knowledge and understanding of risk in a financial services environment	F	5	5
230075	Demonstrate knowledge and insight into the changing nature of the financial services industry and its consumers.	F	5	6
114206	Analyse the strategic impact of a successful wellness programme	E	5	5
242570	Investigate industry initiatives to quality control medical providers	E	5	6
	TOTAL			33

Study School 3

CODE	UNIT STANDARD TITLE		NQF Level	Credits
230078	Apply the principles of ethics to a business environment	C	6	10
242575	Conduct an in depth investigation into the current healthcare sector in South Africa using published data	E	5	8
230070	Present an informed argument on a current issue in a business sector	F	5	5
242565	Manage costs in a specific case with due regard for quality	E	5	2
	TOTAL			28

Study School 4

CODE	UNIT STANDARD TITLE		NQF Level	Credits
120075	Demonstrate insight into current affairs in the Financial Services Sector.	F	5	10
242580	Apply scenario planning to explain potential risk in a specified financial services context.	C	5	6
242601	Apply a researched trend to individual financial risk.	C	5	5
242594	Apply knowledge of the different asset classes in order to give financial advice	C	5	4
242567	Analyse the product design/structure of different medical schemes to evaluate the benefit of each scheme	E	5	5
242571	Apply knowledge of health economics to make an informed decision	E	6	3
	TOTAL			30

- Please note – that the US suggested (Electives) are more than the required credits for the full qualification. – (Full qualification : 120 credits)
- This specific curriculum – 122 credits

WHY USB-ED/PSG KONSULT ACADEMY?

- Combination of a leading organisation and brands in the executive development and financial services industry
- Accredited face to face tutoring by distinguished faculty and subject matter experts
- Well structured model of four focused study schools with individual support
- Practical and humane assessments that are designed for optimal learning and support
- Certificate to be issued by INSETA after successful completion of the full qualification
- Renowned administration and support

VENUES AND DATES

The study schools will be presented in Gauteng (Centurion) and Cape Town.

We are also prepared to facilitate the study schools at any venue if there are 20 or more participants.

PRICE (including VAT) per student:

- **R 3 390.00** per Study School workshop/facilitation – refreshments included
- **R2 390.00** per Study School distance learning/self study
 - **One free** summative re-assessment, there after **R350.00** per summative assessment paper
 - Formative (workbook) Re-assessment: **R130.00 per unit standard**
- Please refer to the registration form's **terms and conditions** for all other possible additional costs

These prices include:

- All learning material, with the exception of additional notes
- One (1) *Fundamentals of Financial Planning Handbook* for **2011** (Value ± R600.00) to be used for the full qualification (ALL four study schools)
- Assessments as per the terms & conditions; moderation & verification
- Confirmation of credits after each successful study school

Excludes: posting/couriering any letters and/or certificates. Letters will be e-mailed and certificates can be collected at Centurion or Cape Town offices, or you can organize your own courier.

PLEASE NOTE:

*In case of a cancellation after registration, a **50% cancellation fee** will be applicable. No refunds, (thus **100% cancellation fee**) for any cancellations within 24 hours before the workshop. No refund will be allowed after you have received your material. Cancellation should be done in writing (fax or e-mail) at least 5 (five) days prior to the workshop.*

These prices are valid from 1 November 2010 to 31 October 2011. If you register in 2011, but attend the workshop in 2012, you will be charged the 2012 prices.

CONTACT DETAILS:

Zelda Cronje

OR

Leane Breedt

Tel: +27(0) 861 223 774
Fax: +27(0) 12 679 0472

Tel: +27(0) 861 223 774
Fax: +27(0) 12 679 0472

E-Mail: zelda.cronje@psgkonsult.co.za

leane.breedt@psgkonsult.co.za

Alternatively:

Charmaine Garcia from the USB Business School

Tel: +27(0) 21 918 4488;

E-mail: Charmaine.garcia@usb-ed.com