



ADMISSION POLICY

***NATIONAL CERTIFICATE IN WEALTH MANAGEMENT NQF 5 and
NATIONAL CERTIFICATE IN SHORT TERM INSURANCE NQF 5***

REGISTRATION

Dear student,

In order to register for the qualification: **National Certificate: Wealth Management: NQF Level 5**, you need to have the following in place, before we can accept your registration.

1. Certified Identity Document;
2. Certified Grade 12 certificate;
3. Other relevant tertiary education certificates;
4. Certified Marriage certificate (if married);
5. Payment made in full for the qualification or per Skills Programme;
6. Brief curriculum vitae;
7. Complete your full information on the online registration form.

Qualification Name:	National Certificate in Wealth Management
Focus:	Financial Planning Skills
Focus:	Investment Planning
Focus:	Health Care Benefits
Focus:	Corporate Retirement Fund Benefits
SAQA ID:	57608
Credits:	120
NQF Level:	5

PURPOSE

The purpose of the National Certificate: Wealth Management Level 5 is to build the knowledge and skills required by employees in Wealth Management who have achieved a Qualification equivalent to NQF Level 4, preferably in a Financial Services related field, and are ready to study at Level 5. It is intended to empower learners to acquire knowledge, skills, attitudes and values required to operate ethically and responsibly in the highly regulated Financial Services environment and to respond to the challenges posed by the changing nature of the Financial Services Industry. It should add value to the qualifying learner in terms of enrichment of the person, status, licensing and recognition.

As a 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.

The National Certificate: Wealth Management: Level 5 is a building block for learners who wish to follow a career path in Financial Services within Long-Term Insurance and Investment. The skills, knowledge, values and attitudes reflected in the Qualification are building blocks that can be developed further at Level 6.

TARGET MARKET

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.

ACCESS TO THE QUALIFICATION / ENTRY REQUIREMENTS

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.

LEARNING ASSUMED TO BE IN PLACE

Learners should be competent in Communication and Mathematical Literacy at NQF Level 4.

In order to register for the qualification: **National Certificate: Short Term Insurance: NQF Level 5**, you need to have the following in place, before we can accept your registration.

1. Certified Identity Document;
2. Certified Grade 12 certificate;
3. Other relevant tertiary education certificates;
4. Certified Marriage certificate (if married);
5. Payment made in full for the qualification or per Skills Programme;
6. Brief curriculum vitae;
7. Complete your full information on the online registration form.

Qualification Name:	National Certificate: Short Term Insurance
SAQA ID:	57918
Credits:	120
NQF Level:	5

PURPOSE

The purpose of the National Certificate: Short Term Insurance: Level 5 is to build the knowledge and skills required by senior employees in Short Term Insurance who have achieved the Qualification requirements for the Fit and Proper Determination for Short Term Insurance and are ready to study at Level 5. It is intended to empower learners to acquire knowledge, skills, attitudes and values required to operate ethically and responsibly in the highly regulated Financial Services environment and to respond to the challenges posed by the changing nature of the Financial Services Industry. It should add value to the qualifying learner in terms of enrichment of the person, status, and recognition both in South Africa and Internationally.

As a Qualification in Short Term Insurance, it provides a framework for learners to develop competencies related to Short Term Insurance (which includes Personal, Commercial and Corporate lines), with a specific focus on very large and complex Corporate and Commercial accounts. 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 in aspects of risk transfer and risk financing to meet specific high risk needs.

TARGET MARKET

The Qualification is intended for people in senior positions and management roles in the Short Term Insurance Industry (Personal, Commercial and Corporate lines) including, but not limited to, Intermediaries Senior/experienced Underwriters, Senior/experienced Claims Administrators, Loss Adjusters, Auditors who specialise in Short Term insurance and Compliance Practitioners.

ACCESS TO THE QUALIFICATION / ENTRY REQUIREMENTS

Learners should have at least a Level 4 Qualification and should meet the requirements for licensing as indicated in the current Determination of Fit and Proper Requirements for Financial Services Providers of the Financial Services Board under the Financial Advisory and Intermediary

Services Act (FAIS) (Act 37 of 2002). It is preferable that learners should first complete the FETC: Risk Management or the National Certificate: Risk Management: Level 4 before accessing this Qualification.

LEARNING ASSUMED TO BE IN PLACE

Learners should be competent in Communication and Mathematical Literacy at NQF Level 4.

Please see our policy on the RPL process that can be followed.



Johann Cloete
Managing Director
Integrity Academy (Pty) Ltd