



Fact Sheet

Financial Advisor
(Day Classes)



Creative &
Technology
Universitas

Financial Advisor (Day Classes)

FACULTY OF BUSINESS AND MANAGEMENT

Occupational Studies: 2024 Fact Sheet

Programme Title	SAQA ID	Credits	NQF
Occupational Certificate: Financial Advisor	105026	515	6

Programme description

From learning how to analyse clients' needs to crafting tailored solutions, you'll learn to navigate complex financial landscapes and make a real impact as a trusted advisor. Get ready to guide clients through investments, mitigate risks, and protect their wealth while building a rewarding career in finance!

The Occupational Certificate: Financial Advisor programme equips students with the essential skills and knowledge required to excel in the dynamic field of financial advisory. Throughout the course, students delve into the intricacies of analyzing clients' financial needs and devising tailored solutions to foster the protection and expansion of wealth. With a comprehensive curriculum designed to address real-world challenges, students learn to navigate complex financial landscapes and facilitate the implementation of strategic financial plans. Whether it's guiding clients through investment decisions or mitigating risks, students emerge prepared to make a meaningful impact as trusted financial advisors in the industry.

Admission requirements

- ▶ NQF Level 4 with Communication.
- ▶ The RPL process could also be applied to gain access to the Occupational certificate: Management Accounting Officer

Mode of study | Duration

Day Classes (full time): 4 Years (5 days/week)

Programme outline

Year 1

- ▶ Overview of the Investment Advisory Industry
- ▶ Health Care Benefits Advisory Services

Year 2

- ▶ Principles of Wealth Creation
- ▶ Processes of Wealth Creation

Year 3

- ▶ Structuring of Retirement Funds and Employee Benefits
- ▶ Fundamentals of Investments

Year 4

- ▶ Principles of Providing Advice

Teaching and Learning Methodology

A blended teaching and Learning methodology is followed. All theory classes will be conducted Virtually through

Lecturer-led interactive teaching on a national basis. A flipped classroom approach will be followed in some sessions. This means that students are introduced to content at home and practice working through it during the applicable session, either the virtual theory sessions or the practical sessions. All students will be allocated to lecturers that are not necessarily based at the campus of enrollment but who will always be subject matter experts. CTU implements a national academic standard and all lecturers have been appointed on the same criteria and use the same academic content in the teaching and learning process. The adherence to a national academic standard is monitored by the Academic Management team at the Head office. Therefore, all students will continue to receive the same quality of education. Students will attend some practical, group, and research sessions on campus or virtually. The same work and time will be spent on both methods, face to face and VLIT, with students. Extra practical sessions can be booked with the Campus Operational Manager. Students will be expected to attend the practical, group, and research classes on campus a minimum of two days a week, as per the campus schedule.

Textbooks and e-guides

A list of prescribed textbooks will be provided in your e-guides. Students will receive an electronic version of the academic guides (e-guides) for this programme on the Teaching and Learning platform. Access is available to an electronic library of textbooks on O'Reilly, and it is included in the fees. Refer to the [Device Specifications and Stationery List](#) document for more information.

Technology hardware, software and data requirements

Because CTU is embracing the future of education - education beyond the classroom - it is compulsory for students to have their own laptop with the necessary specifications to speed up their journey to success.

Student Support

Student support sessions with the facilitator will also take place on a one-on-one basis either virtually or physically at the campus per appointment or per the academic schedule.

Certification

On successful completion and verification by the Quality Assurance Partner of the programme, the student will receive an Occupational Certificate: Financial Advisor (SAQA ID: 105026, NQF 5)

Career fields

Students can be employed in the following career fields:

After Year 1

- ▶ Long Term Insurance Advisor
- ▶ Financial Advisor
- ▶ Investment Advisor

After Year 2

- ▶ Insurance Underwriter
- ▶ Long Term Insurance Advisor
- ▶ Wealth Management Professional
- ▶ Financial Advisor

After Year 3

- ▶ Employee and Pension Fund Benefit Advisor
- ▶ Personal Financial Planner
- ▶ Financial Services Call Centre Agent
- ▶ Retirement Fund Consultant

After Year 4

- ▶ Investment Advisor
- ▶ Estate Planner
- ▶ Financial Analyst
- ▶ Wealth Management Specialist
- ▶ Risk Management Consultant
- ▶ Financial Planner

What is EISA?

The External Integrated Summative Assessment (EISA) is an integral and critical component of the QCTO's quality assurance system. It is a single national assessment leading to the awarding of an Occupational Certificate. EISA ensures that the assessment of occupational qualifications, part qualifications and trades is standardised, consistent and credible.

For learners to qualify for entry to EISA, they must provide proof of completion of all required knowledge, practical and work experience modules as stipulated in the qualification. The statement of results obtained from the Skills Development Provider serves as proof that the candidate has satisfied all the requirements to be admitted to sit for EISA.

Pricing*

Programme	Registration Fees	Tuition fee
Year 1	R9 000	R60 000
Year 2	R9 000	R63 000
Year 3	R9 000	R66 150
Year 4	R9 000	R69 500

* Excludes external fees and identified textbooks if applicable.

* Prices are subject to annual adjustments.

Payment

Visit our website to view the payment method. [Payment Methods.](#)

APPLY for Student Loan HERE!

Additional costs

Students must make provision for additional items such as textbooks, stationery, supplementary examinations, research costs and printing, field trips etc.

Disclaimer

The content of this fact sheet is subject to change without notification due to market trends in the industry, legislation and/or programme version updates. Refer to website for the latest version of the prospectus. Creative & Technology Universitas, a division of CTU Training Solutions (PTY) Ltd, reserves the right to change the programme content without prior notice. Additional international exams may be written but are not included in the programme fee. Minimum student (capacity) group sizes will fall into the Virtual Instructor-Led programme commencing in the months of February & July of each year.

I (Name of student):..... hereby acknowledge that I understand the information stated in this document and fully comprehend the specifics explained above pertaining to this qualification.

Student signature:.....

Signature of legal guardian:.....

Name of legal guardian:.....

Consultant signature:.....

Name of sales consultant:.....

Date:.....

* Please note the original signed copy should be kept on the student record file.

CONTACT US

customerservice@ctutraining.co.za | ctutraining.ac.za | 0861 100 395