

## ENTWISE TRAINING AND CONSULTING

### WEALTH MANAGEMENT 4

150 Credits

### PROGRAMME LINE UP 2016/2017

SKILLS PROGRAMME 1	ID	CREDITS	TYPE
<b>Theme 1: Ethics and Risks in Life and at Work</b>			
Demonstrate knowledge and application of ethical conduct in a business environment	<a href="#">242655</a>	4	Core
Manage risk in own life	<a href="#">114970</a>	3	Core
<b>Theme 2: Basic Economics</b>			
Explain basic economics	<a href="#">117132</a>	3	Core
<b>Theme 3: Legislation 1: FAIS &amp; FICA</b>			
Explain South African money laundering legislation and the implications for accountable institutions in transacting with clients	<a href="#">242593</a>	3	Core
Demonstrate knowledge and understanding of the Financial Advisory and Intermediary Services Act 2002 (FAIS) (Act 37 of 2002) as it impacts on a specific financial services sub-sector	<a href="#">242584</a>	2	Elective
<b>Theme 4: Legislation 2: Long Term &amp; Short Term</b>			
Apply knowledge and insight into aspects of the Long Term Insurance Act, Act 52 of 1998	<a href="#">117126</a>	2	Elective
Apply knowledge and insight into the Short Term Insurance Act (No 53 of 1998) and the accompanying regulations	<a href="#">117121</a>	3	Elective
<b>Theme 5: Customer Care</b>			
Apply the skills of customer care in specific work environment	<a href="#">119676</a>	4	Elective
Demonstrate skills and techniques required to build a relationship with a client in a financial services environment	<a href="#">243137</a>	3	Elective
<b>Theme 6: Insurable Risks</b>			
Demonstrate knowledge of Insurable risk	<a href="#">120128</a>	3	Elective
<b>Total Credits</b>		<b>30</b>	
SKILLS PROGRAMME 2	ID	CREDITS	TYPE
<b>Theme 7: Fraud Control</b>			
Describe the control of fraud in Long-term insurance	<a href="#">119261</a>	3	Elective
<b>Theme 8: Introduction to Wealth Management</b>			
Explain the structure of the financial services industry in South Africa	<a href="#">243144</a>	4	Core
Investigate the range of options available for wealth management	<a href="#">243134</a>	5	Core
<b>Theme 9: Long Term Products</b>			
Analyse the different products available in the Long-term Insurance industry and the benefits of each	<a href="#">119478</a>	5	Elective
Describe funeral insurance	<a href="#">114956</a>	2	Elective
<b>Theme 10: Personal Accident Insurance</b>			
Apply knowledge and understanding of personal accident insurance	<a href="#">120022</a>	2	Elective
<b>Theme 11: Current events reported in the media</b>			
Analyse current events reported in the media that could impact on wealth management	<a href="#">243133</a>	10	Core
<b>Total Credits</b>		<b>31</b>	
SKILLS PROGRAMME 3	ID	CREDITS	TYPE
<b>Theme 12: Basic Investment Principles and Financial Instruments</b>			
Explain basic investment principles	<a href="#">243153</a>	4	Core
Explain Capital Markets and Capital Market Instruments	<a href="#">243142</a>	2	Core
Explain Equity Markets and equity market instruments	<a href="#">243148</a>	2	Core
Explain money markets and money market instruments	<a href="#">243154</a>	2	Core
<b>Theme 13: Retirement Provision</b>			
Investigate the need to provide financially for own retirement	<a href="#">114960</a>	3	Core
Develop a business plan for a small business	<a href="#">117241</a>	5	Elective
Investigate the possibilities of establishing and running a small business enterprise (SMME)	<a href="#">117244</a>	3	Elective
<b>TOTAL</b>		<b>21</b>	
SKILLS PROGRAMME 4	ID	CREDITS	TYPE
<b>Theme 14: Basic Financial statements</b>			
Interpret Basic Financial Statements	<a href="#">117156</a>	4	Fundamental
<b>Theme 15: Income Tax principles and application</b>			
Describe and apply the principle of personal income tax	<a href="#">117127</a>	3	Fundamental
<b>Theme 16: Managing Risk in own Life</b>			
Investigate ways of managing financial risks in own lives	<a href="#">117158</a>	5	Fundamental
<b>Total Credits</b>		<b>12</b>	

<b>SKILLS PROGRAMME 5</b>	<b>ID</b>	<b>CREDITS</b>	<b>TYPE</b>
<b>Theme 15: Introductory Statistics and Probability</b>			
Apply knowledge of statistics and probability to critical interrogate and effectively communicate findings on life related problems	9015	6	Fundamental
<b>Theme 16 : Shapes and Motion</b>			
Represent analyse and calculate shape and motion in findings on the life related problems	9016	4	Fundamental
<b>Theme 17: Financial Aspects</b>			
Use mathematics to investigate and monitor the financial aspects personal, business, national and international	7468	6	Fundamental
<b>Total Credits</b>		<b>16</b>	
<b>SKILLS PROGRAMME 6</b>	<b>ID</b>	<b>CREDITS</b>	<b>TYPE</b>
<b>Theme 18: Communication 1st Languages</b>			
Engage in sustained oral communication and evaluate spoken texts	119462	5	Fundamental
Read analyse and respond to variety of texts	119469	5	Fundamental
Write for a wide range of contexts	119459	5	Fundamental
Use languages and communicatin in occupational learning programmes	119471	5	Fundamental
<b>Theme 19: Communication Additional Language</b>			
Accommodate audience context needs in oral communication	119472	5	Fundamental
Interprete and use information from texts	119457	5	Fundamental
Write text for a range of communicative contexts	119465	5	Fundamental
Use languages and communicatin in occupational learning programmes	119467	5	Fundamental