Occupational Certificate: Long Term Insurance Advisor NQF 5

PURPOSE

A long Term Insurance Advisor advises clients regarding the use of long term insurance products to sustain and protect wealth.

COURSE CONTENT

Module 1: Introduction to the Investment Advisory Industry

- Overview of the investment advisory industry

Module 2: Principles of Providing Advice

- Regulatory requirements for advising clients regarding insurance and investments
- Principles of providing advice to clients regarding insurance, savings and retirement planning

Module 3: Analysis and Evaluation of Investment Opportunities

- Analyse clients long term wealth creation/protection needs
- Evaluate available long term wealth creation/protection options

Module 4: Facilitation and Implementation of Investment Decisions

- Recommend and implement the most appropriate wealth creation/protection options
- Participate in the processes of wealth creation

DELIVERY

- Duration: 24 Months
- Delivery: Classroom/online/blended

ENTRY LEVEL REQUIREMENTS

- NQF Level 4 qualification with Communication.

CAREER POSSIBILITIES

- Long Term insurance advisor

Contact your preferred Sales Executive for assistance or email us at **support@speccon.freshdesk.co.za** to find out more.

ACCREDITATION

- Occupational Certificate: Long Term Insurance Adviser
- Accreditation: QCTO
- SAQA ID: 105022
- NQF Level: 5

MORE INFO

OUR MOST POPULAR CATEGORIES

SHORT COURSES

LEARNERSHIPS

COMPLIANCE TRAINING

Contact your preferred Sales Executive for assistance or email us at **support@speccon.freshdesk.co.za** to find out more.

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