



RLP TRAINING



TRAINING PROSPECTUS



Accreditation No: 130298



ABOUT US



VISION

RLP Training is the chosen Training Centre for all individuals looking to complete a qualification that will open up a whole new world of opportunities.



MISSION

While determined to act honestly and with integrity, our training standard is at the highest level. We will reach our goals and visions by keeping this ethical standard and through growing and empowering our employees and students at all times.

WHAT WE OFFER:



SALES OBSTACLES

What does the course entail?

Common obstacles that dealership sales staff encounter on a daily basis, including identifying customer needs, changing sales strategies, how to deal with stock shortages AND negotiation.

Delivery: Method:

Online on our Learner Management System (LMS)

Registration dates will be available in:

- February
- May
- August
- November

Entry Requirements:

Basic literacy
Course material and quizzes will be online. Candidate should have the necessary technology available to partake

Course duration:

45 Days

COURSE FEE

R750.00each



LEGISLATION & THE SALES EXECUTIVE

What does the course entail?

This is an **online** course focusing on FICA, but also includes other legislation like the FAIS Act & POPI Act. We particularly focus on the implementation of the RMCP (Risk Management & Compliance Programme) and the consequences of non-compliance when it comes to FICA.

Entry Requirements:

Basic Literacy
Course material and quizzes will be online. Candidate should have the necessary technology available to partake.

Course duration:

This is a quick course, but candidates will be granted access to our portal for 30 days.

COURSE FEE

R425.00each

Weekly progress reports will be available for group bookings.

WHAT WE OFFER:



NCA **(NATIONAL CREDIT ACT TRAINING)**

The National Credit Act 34 of 2005 (NCA) was enacted on 15 March 2005 and officially commenced on 9 May 2006. The purpose of this Act is to create a secure credit marketplace that is fair and non-discriminatory against customers as well as minimising reckless lending by credit providers.

This course focuses on the implementation of the Act and the different role-players.

This course is compulsory for all agents of credit providers in the motor industry. It is a short course that is fully accredited by the Institute of bankers. Successful candidates will receive an NCA certificate from the IOB and an accreditation card from RLP Training.

Topics discussed:

- Module 1: An overview of the National Credit Act
- Module 2: Consumer Credit Institutions
- Module 3: Credit Agreements
- Module 4: Consumer Rights
- Module 5: Affordability assessment, over-indebtedness and reckless credit
- Module 6: Complaints and Disputes

Includes:

- Study Material
- Brainchart
- Mock Exam

Pretoria based dealerships, enrolling 7 or more candidates per intake, have the option of on-site training and exam session

Entry Requirements:

Basic Literacy
Training and examination will be online
Candidate should have the necessary technology available to partake.

Course duration:

Day 1: 2.5 hours online Zoom training session
Day 2: 2 hours exam

COURSE FEE

R2050.00

***SUCCESSFUL CANDIDATES REQUIRE A MINIMUM OF 70% TO PASS**





CLASS OF BUSINESS

What does the course entail?

Representatives of financial services providers have the legal obligation to complete the relevant Class of Business training within 12 months of date of first appointment. These small courses contain valuable information about financial product design and also provide the representative with the knowledge to complete needs analysis' with clients.

Training and examinations are completed online on our Learner Management System.

We offer the following Class of Business courses:

- Class of Business – Short Term Insurance – Personal Lines
- Class of Business – Short Term Insurance – Commercial Lines
- Class of Business - Long Term Insurance
- Class of Business – Deposits
- Class of Business – Foreign Exchange
- Class of Business – Health Service Benefits
- Class of Business – Investments
- Class of Business – Pension Fund Benefits

Certificates will be issued upon successful completion of each Class of Business

Entry Requirements:

Basic literacy

Course duration:

Candidates will be granted access to our LMS for 30 days

COURSE FEE

R402.50 each



RE5 REPRESENTATIVE WORKSHOP

What does the course entail?

The “Regulatory Examinations” along with stricter minimum formal qualifications were introduced to better meet clients’ financial needs in South Africa. The regulatory exams are being developed and delivered under the direction and management of the FSCA.

Entry Requirements:
Basic Literacy

Topics discussed:

1. Demonstrate understanding of the FAIS Act as a regulatory framework.
2. Contribute towards maintaining a FSP licence.
3. Define the role of the key individual in terms of the FAIS Act.
4. Adhere to the specific Codes of Conduct.
5. Comply with regulated record keeping requirements.
6. Comply with the requirements of the FIC Act and Money Laundering and Terrorist Financing control regulations, as it applies to the FSP.
7. Dealing with complaints that have been submitted to the Ombud for FSPs.
8. Operate as a Representative in terms of the FAIS Act.

	OPTION 1	OPTION 2	OPTION 3
	Attend a facilitated workshop at our offices in Pretoria	Study with assistance on our Learner Management System	RE5 Preparation Pack (for candidates who prefer self-study)
Includes	<ul style="list-style-type: none"> • Study material • Visual Aids • Mock Exams 	<ul style="list-style-type: none"> • Recorded Training Videos • Study Material • Visual Aids • Mock Exam • Weekly Q&A Session with RE Facilitator 	<ul style="list-style-type: none"> • Study Material • Visual Aids • Mock Test & Answers • How to prepare for the exam guide
Duration	2 Day workshop of 8 hours each	30 Day access to our LMS	
FEES	R1 550	R1 350	R580 + R99 Courier Fee (if not collected from our offices)

*** None of the options listed above include the exam**



RE1 KEY INDIVIDUAL WORKSHOP

What does the course entail?

The “Regulatory Examinations” along with stricter minimum formal qualifications were introduced to better meet clients’ financial needs in South Africa. The regulatory exams are being developed and delivered under the direction and management of the FSCA.

Students studying for their RE1-Key Individual exam are required to study the same material as RE5- Representative and focus a bit more on legislation sections applicable to Key Individuals.

Topics discussed:

1. Demonstrate understanding of the FAIS Act as a regulatory framework.
2. Define financial products and financial services.
3. Maintain the licence of the FSP.
4. Operate as a key individual in terms of the FAIS Act.
5. Manage and oversee the operational ability of the FSP.
6. Adhere to the specific Codes of Conduct.
7. Manage and oversee the compliance functions as required by the FAIS Act.
8. Comply with regulated record keeping requirements.
9. Manage and oversee the accounting and auditing requirements.
10. Manage and oversee the requirements of the FIC Act and Money Laundering and Terrorist Financing control regulations, as it applies to the FSP.
11. Deal with complaints that have been submitted to the Ombud for FSPs.
12. Define the role of the representative in terms of the FAIS Act.
13. Manage and oversee the appointment of representatives.
14. Manage the rendering of services under supervision.
15. Manage and oversee the representatives appointed by a FSP.
16. Debar representatives that have failed to comply with any provision of the FAIS Act in a material manner.

Entry Requirements:
Basic Literacy

	OPTION 1	OPTION 2	OPTION 3
	Attend a facilitated workshop at our offices in Pretoria	Study with assistance on our Learner Management System	RE1 Preparation Pack (for candidates who prefer self-study)
Includes	<ul style="list-style-type: none"> • Study material • Visual Aids • Mock Exams 	<ul style="list-style-type: none"> • Recorded Training Videos • Study Material • Visual Aids • Mock Exam • Weekly Q&A Session with RE Facilitator 	<ul style="list-style-type: none"> • Study Material • Visual Aids • Mock Test & Answers • How to prepare for the exam guide
Duration	2 Day workshop of 8 hours each	30 Day access to our LMS	
FEES	R1 950	R1 700	R710 + R99 Courier Fee (if not collected from our offices)

*** None of the options listed above include the exam**



SHORT TERM INSURANCE NQF4 AKA FAIS/FINANCE & INSURANCE COURSE

SAQA ID 49929

150 Credits

FAIS recognised qualification

What does the course entail?

The course is accredited by INSETA.

We offer the 150 FAIS credits course as a face-to-face facilitated course, or a facilitated distance learning course. The course has been divided into smaller skills programmes (the traditional FAIS 1, FAIS 2, FAIS 3 etc.)

There is a Portfolio of Evidence that must be submitted for every skills programme, followed by a closed-book summative examination.

Classes are either online via Zoom or facilitated from our offices in Pretoria. (Level 2, HB Forum Building, 13 Stamvrug Street, Val de Grace)
Off-site training can be arranged for groups larger than 10.

Topics discussed:

CORE COMPONENTS

ID	UNIT STANDARD TITLE	LEVEL	CREDITS
13940	Demonstrate knowledge and application of ethical conduct in a business environment	4	4
113911	Use an electronic system as a tool in a financial services context	3	2
114943	Describe how to manage workplace relationships	3	2
114985	Indicate how different needs lead to the development of different Financial Service products	3	4
117117	Describe standard insurance cover in terms of SASRIA	4	4
117133	Manage own work performance in relation to an organisation's performance management system	3	2
119265	Manage risk in own work environment	4	2
119676	Apply the skills of customer care in a specific work environment	4	4
120005	Demonstrate knowledge and understanding of personal motor insurance	4	4
120019	Analyse new developments reported in the media that could impact on Short Term insurance	4	10
120121	Apply technical knowledge and understanding of the cover provided under a Short Term Multi-Peril Insurance policy	4	5

Entry Requirements:

Basic reading and writing
(Level 3)

Course duration:

Candidates are given 12 months to complete the course. It is possible to do it in less time depending on the commitment from the student

COURSE FEE

Each skills programme is priced separately.

Skills programme 1, 2 & 3

R4 900.00 each

(Compulsory)

Financial literacy

R3 059.00

(Compulsory)

Full Course

R17 500.00

CORE COMPONENTS continued

ID	UNIT STANDARD TITLE	LEVEL	CREDITS
120124	Demonstrate knowledge of insurable risk	4	3
120127	Demonstrate knowledge and understanding of issues of compliance or non-activity that could result in civil or criminal liability in terms of business law	4	2
120128	Apply the law of contract to insurance	4	3

TOTAL CREDITS 51

ELECTIVE COMPONENTS

ID	UNIT STANDARD TITLE	LEVEL	CREDITS
12154	Demonstrate knowledge and insight of the Financial Advisory and Intermediary Service Act	4	2
117121	Apply knowledge and insight into the Short Term Insurance Act (no53 of 1998) and the accompanying regulations	4	3
120011	Apply knowledge of Personal All Risks Insurance	4	2
120015	Demonstrate knowledge and understanding of House Owners Insurance	4	3
120016	Apply knowledge of Insurance of Household Contents	4	4
120022	Apply knowledge and understanding of Personal Accident Insurance	4	2
120115	Apply technical knowledge and understanding of business insurance	4	10
120118	Underwrite a Standard Risk in Short Term Personal Insurance	4	6

TOTAL CREDITS 32

FUNDAMENTAL COMPONENTS - FINANCIAL LITERACY

ID	UNIT STANDARD TITLE	LEVEL	CREDITS
117156	Interpret basic financial statements	4	4
117158	Investigate ways of managing financial risk in own lives	4	5
117127	Describe and apply the basic principles of personal income tax	4	3

TOTAL FUNDAMENTAL CREDITS 12

Additional fees:

*Mathematics: R3059 (Only if the candidate did not pass mathematics or mathematical literacy in matric)

*Language: R3059 per required language (Only if the candidate did not pass 2 South African languages in matric)

*Learners who have acquired credits already can contact us for a quotation on outstanding unit standards.



Payment options:

Option 1: Full payment upon registration.

Option 2: 50% upon registration, 25% upon submission of skill programme 2, 25% upon submission of Financial Literacy

Payment options (per skills programme):

Option 1: Full payment.

Option 2: 50% upon registration
25% upon submission of portfolio of evidence
25% upon admission to write summative exam



POSSIBLE CAREER OPTIONS

1. Vehicle Finance Manager
2. Short Term Insurance Consultant.
3. Banking.
4. Financial Management.
5. Financial Advisor.





RLP TRAINING



FULL F&I FIT AND PROPER PACKAGE

All you need to become a qualified F&I included:

- FAIS
 - RE5 – Representative
 - NCA
 - COB
- (INCLUDES FIRST RE5 EXAM)

WAS R23 333
NOW ONLY
R22 500

Register now

 info@rlptraining.co.za

HB Forum Building | 2nd Floor
13 Stamvrug Street | Val De Grace Pretoria

Accreditation No: 130298





RECOGNITION OF PRIOR LEARNING

- Short Term Insurance (NQF4)

SAQA ID 49929

150 Credits

FAIS recognised qualification

What does the course entail?

Completing the qualification via an RPL intervention which refers to Recognition of Prior Learning. That means that you will not receive any learning material, only a portfolio followed by a summative assessment with requests to add administration documentation and naturally occurring workplace evidence into your file.

This course is fully accredited by INSETA.

Entry Requirements:

5 years relevant insurance industry experience.

Course duration:

12 months to complete relevant portfolio of evidence and closed-book summative examinations.

COURSE FEE

R15 500.00

(Payment plan options available)

Topics discussed:

CORE COMPONENTS

ID	UNIT STANDARD TITLE	LEVEL	CREDITS
13940	Demonstrate knowledge and application of ethical conduct in a business environment	4	4
113911	Use an electronic system as a tool in a financial services context	3	2
114943	Describe how to manage workplace relationships	3	2
114985	Indicate how different needs lead to the development of different Financial Service products	3	4
117117	Describe standard insurance cover in terms of SASRIA	4	4
117133	Manage own work performance in relation to an organisation's performance management system	3	2
119265	Manage risk in own work environment	4	2
119676	Apply the skills of customer care in a specific work environment	4	4
120005	Demonstrate knowledge and understanding of personal motor insurance	4	4
120019	Analyse new developments reported in the media that could impact on Short Term Insurance	4	10
120121	Apply technical knowledge and understanding of the cover provided under a Short Term Multi-Peril Insurance policy	4	5
120124	Demonstrate knowledge of insurable risk	4	3
120127	Demonstrate knowledge and understanding of issues of compliance or non-activity that could result in civil or criminal liability in terms of business law	4	2
120128	Apply the law of contract to insurance	4	3

TOTAL CREDITS 51

ELECTIVE COMPONENTS

ID	UNIT STANDARD TITLE	LEVEL	CREDITS
12153	Use the writing process to compose texts required in the business environment	4	5
120110	Underwrite a standard risk in short term commercial insurance	4	10
120115	Apply technical knowledge and understanding of business insurance	4	10
120122	Apply knowledge of Short Term Insurance to the All Risks section of a commercial policy	4	2
12164	Demonstrate knowledge and insight of the Financial Advisory and Intermediary Services Act (FAIS) (Act 37 of 2002)	4	2
13912	Apply knowledge of self and team in order to develop a plan to enhance team performance	3	5
120135	Apply technical knowledge and understanding of business motor insurance	4	5

TOTAL CREDITS 39

FUNDAMENTAL COMPONENTS

ID	UNIT STANDARD TITLE	LEVEL	CREDITS
117156	Interpret basic financial statements	4	4
117158	Investigate ways of managing financial risk in own lives	4	5
117127	Describe and apply the basic principles of personal income tax	4	3

TOTAL CREDITS 12

Additional fees:

*Mathematics: R3059 (Only if the candidate did not pass mathematics or mathematical literacy in matric)

*Language: R3059 per required language (Only if the candidate did not pass 2 South African languages in matric)

*Learners who have acquired credits already can contact us for a quotation on outstanding unit standards.

Payment options:

Option 1: Full payment upon registration.

Option 2: We offer a payment plan where candidates pay 50% of their registered studies upon registration, 25% when submitting their assignment and the remaining 25% when admitted to writing the examination.



WEALTH MANAGEMENT NQF5

SAQA ID 66611
120 Credits

What does the course entail?

The purpose of the National Certificate: Wealth Management Level 5 is to build the knowledge and skills required by employees in Wealth Management 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 Service environment and to respond to the challenges posed by the changing nature of the Financial Services Industry.

Course duration:
12 Months

Entry Level Requirements:

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

COURSE FEE
R21 700.00

Delivery Method:

Facilitated distance learning on our online platform. Candidates should have the necessary technology available.

Career Options:

The qualification has relevance for learners in Retirement Funds and Medical Schemes.

Intermediaries including but not limited to:

- Financial Advisors
- Personal Financial Planners
- Financial Service Providers
- 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 Advisors
- Retail Managers who support Advisors and have a back office function
- Collective Investment Scheme Managers
- Account Executives
- Compliance Officers



Payment options (per skills programme):

Option 1: Full payment upon registration.

Option 2: 50% upon registration
25% upon final assignment submission
25% before first final exam

*Please note: Learners with outstanding accounts will not be permitted to write their exams.

Topics discussed:
CORE COMPONENTS

ID	DESCRIPTION	CREDITS	LEVEL
230078	Apply the principles of ethics to a business environment	10	6
242554	Research information in order to assist in conducting a financial risk assessment	7	5
242574	Present a proposal to optimise the tax aspects of the wealth management of an entity	4	5
242580	Apply scenario planning to explain potential risk in a specified financial services context	6	5
242594	Apply knowledge of the different asset classes in order to give financial advice	4	5
242601	Apply researched trend to individual financial risk	5	5
242573	Determine the needs and wants of an entity in order to propose an appropriate financial solution	4	5

FUNDAMENTAL MODULES

ID	DESCRIPTION	CREDITS	LEVEL
230071	Apply basic economic principles to the financial services sector	5	5
120075	Demonstrate insight into current affairs in the financial services sector	10	5
230075	Demonstrate knowledge and insight into the changing nature of the financial services industry	6	5
119997	Demonstrate knowledge and understanding of risk in a financial services environment	5	5
230077	Describe the financial lifecycle of an individual and how this influences financial decisions	8	5
230070	Present an informed argument on a current issue in a business sector	5	5

ELECTIVE MODULES

ID	DESCRIPTION	CREDITS	LEVEL
242590	Apply knowledge and skill to explain the application of structured long term insurance portfolios	6	5
242562	Demonstrate knowledge and understanding of the fundamental principles of risk finance in order to propose an insurance solution	5	5
230073	Explain how the lifecycle of a business entity affects investment and insurance decisions	6	6
117129	Apply the regulations for disclosure that are required as part of the financial sales process	2	4
242557	Research theories of behavioural economics and behavioural finance to explain the influence of emotion on financial decisions	4	6
242571	Apply knowledge of health economics to make an informed decision	3	6
242572	Evaluate the relevant performance of a fund/portfolio manager	5	6
242593	Explain South African money laundering legislation and the implications for accountable institutions in transacting with clients	3	4
242597	Apply technical knowledge and skill to advise business entities on insurance and group retirement benefits	5	6
242603	Apply knowledge of estate planning to propose a financial solution for a specific client	8	5