

MOONSTONE

BUSINESS SCHOOL OF EXCELLENCE



MOONSTONE BUSINESS SCHOOL OF EXCELLENCE (PTY) LTD

PROSPECTUS 2021

MOONSTONE BUSINESS SCHOOL OF EXCELLENCE (PTY) LTD

STELLENBOSCH

25 Quantum Street
Technopark
Stellenbosch
Western Cape 7600

PRETORIA

Brooklyn Forum, Lobby 2, 2nd Floor Bank Forum Building
Corner Fehrsen & Veale Street
Brooklyn Pretoria Gauteng
0181

CONTACT PERSONS

General Manager: MBSE

Albert Marais albert@mbse.ac.za

Manager: Administration

Monique Brummer monique@mbse.ac.za

OPERATING HOURS

Monday – Fridays

08:00-16:30

Public Holidays

(CLOSED)

MBSE is a registered Private Company, Registration Number 2005/020855/07. MBSE is currently provisionally registered with the Department of Higher Education and Training as a Private Higher Education Institution until 31 December 2021 under the Higher Education Act, 1997. Registration certificate No. 2011/HE07/005. MBSE is also provisionally registered with the Department of Higher Education and Training as a Private College under the Continuing Education and Training Act, 2006. Registration certificate No. 2018/FE07/028. MBSE is accredited with INSETA: Accreditation No. 130146, and is also registered as an Occupational Certificate Skills Development Provider QCTO No. SDP1228/16/0040.

MISSION STATEMENT

To deliver innovative, value-driven, flexible education and training solutions aligned to the needs of individuals and businesses operating in a continuously evolving environment.

OUR STAFF

TOP MANAGEMENT

CHIEF EXECUTIVE OFFICER

Hjalmar Bekker, MSc Agric
hjalmar@mbse.ac.za

GENERAL MANAGER: MBSE

Albert Marais, BSc-Agric, Hons BSc agric, Hons B (B&A), MBA
albert@mbse.ac.za

SENIOR MANAGEMENT

MANAGER: ADMINISTRATION

Monique Brummer, BCom Hons Financial Management, CIMA Passed Finalist
monique@mbse.ac.za

ACADEMIC MANAGER

Edel Goldbach, CFP®, Adv PG Dip n Financial Planning
edel@mbse.ac.za

MANAGER: LEARNING TECHNOLOGIES

Tariq Sadeck, BTech: Multimedia Technology
tariq@mbse.ac.za

SALES MANAGER: COB/ CPD

Donald Moeletsi, MBA
donald@mbse.ac.za

OUR ACADEMIC STAFF – FULL TIME

Gail Gibson, CFP®, Adv PG Dip in Financial Planning
Senior Lecturer

Julette Wentzel, BCom
Senior Lecturer

Karl-Heinz Michel, PG Dip in Financial Planning
Lecturer

Tyrone Ford, CFP®, Advanced PGDip (Estate Planning and Personal Financial Risk Management)
Senior Lecturer

LANGUAGE

MBSE is committed to providing access to quality education to as many students as possible. It is acknowledged that English is regarded as the business language in this country, and is the primary language of communication globally. English is, therefore, the language of teaching, assessment, communication, learning material and student support.

STUDENT FINANCIAL AID

MBSE does not provide financial aid (such as study loans or bursaries). We do offer a 7.5% discount on settlement of full qualification fees upfront.

(MBSE) has partnered with FUNDI and STUDENT HERO – two leading education funding providers that will help you apply or pre-qualify for different options to fund your tertiary education from a single platform.

Students and/ or their employers can approach the SETAs for possible funding towards learnerships for certain qualifications.

STUDENT SUPPORT SERVICES

Registered Students can contact MBSE for support relating to their studies:

Academic Support: Refer to your MyMBSE Course page for the contact information of the designated lecturer

Admin and/ or IT Support: help@mbse.ac.za, 021 883 8000

SPECIAL NEEDS AND DISABILITIES

We strive to implement consistent and fair processes for accommodating students with special needs or disabilities within and by MBSE employees and service providers. We commit to put in place any reasonable additional support to remove any barriers to successful completion of courses and/ or qualifications.

GENERAL POLICIES

Full policies are made available to all students via the Online Student Management System.

MBSE ADMISSIONS POLICY

The aim of this Policy is to set out criteria for admission for all formal qualifications offered by MBSE. In achieving the stated aim, this Policy recognises the prescriptions of the Higher Education Act, 1997 (as amended).

The policy also acknowledges the vision and mission of MBSE to provide innovative, value-driven and flexible training solutions for all of our students through providing various training solutions (and formal qualifications) which, together, provide a pathway and inclusion of all students to enable them to access higher education qualifications. Where practically feasible taking into account MBSE's capacity, all students who meet admission requirements will be accepted onto the applicable MBSE qualification. In cases where application exceeds our capacity to deliver quality learning, we will make use of selection criteria to select students who show the potential to successfully complete the qualification.

The policy further aims to broaden access, as far as is reasonably possible, with the implementation of the MBSE RPL and CAT policy (Recognition of Prior Learning and Credit Accumulation and Transfer policy), to students that previously had constrained access to higher education. RPL applicants will be considered for selection onto the programme, in line with regulatory requirements.

MBSE RPL AND CAT POLICY

The aim of this Policy is to set out clear guidelines regarding RPL procedures for access to MBSE programmes for all MBSE employees and service providers involved in these processes, in order to ensure that MBSE contributes to the need for widening access to higher education and promoting lifelong learning, while at the same time maintaining the quality and standards of our education programmes and achievements of students.

The policy further aims to set out clear guidelines regarding CAT measurement and evaluation for all MBSE employees and service providers involved in these processes, in order to ensure that students are able to receive formal recognition and certification of a learning achievement, to facilitate lifelong learning and to provide for the mobility of students and enhance their chances of successfully completing their qualification.

MBSE DISABILITY POLICY

The aim of this Policy is to provide for consistent and fair processes for accommodating students with special needs or disabilities within and by MBSE employees and service providers.

The policy also acknowledges the vision and mission of MBSE to provide professional support to students through MBSE's commitment to assisting students with special needs or disabilities by putting in place any reasonable additional support to remove any barriers to successful completion of courses/programmes.

MBSE STUDENT DISCIPLINARY POLICY

The aim of this Policy is to ensure that students have knowledge of the conduct expected of them while studying at MBSE, and the actions which may be taken in the event of any misconduct arising.

The policy also acknowledges the vision and mission of MBSE to provide value-driven training for students through providing students with a safe learning environment where they can derive the maximum benefit from their studies with MBSE.

MBSE STUDENT GRIEVANCE POLICY

MBSE aims to provide a fair process for students to obtain a speedy resolution to any grievance that might arise during the time of their studies at MBSE. Students will have the opportunity to appeal against any decision, the procedure to follow is communicated upon registration.

MBSE STUDENT APPEAL POLICY

This Policy recognises that, from time to time, the student being assessed may not be satisfied with the result of the assessment conducted. MBSE makes provision for two separate, formal processes in order to deal with these complaints:

1. Re-mark process
2. Appeals process

This policy will ensure commitment to providing an environment in which the rights and dignity of its students are upheld, and in which students can feel sure that their grievances and appeals will be taken seriously, investigated promptly and rigorously, and treated in confidence.

MBSE HEALTH AND WELLNESS POLICY

MBSE encourages their students to follow a healthy lifestyle. We recognise that negative factors might exist in a student's study environment that might impact on their health and wellness. Where possible, MBSE will provide guidelines to help students address these factors.

MBSE will at all times seek to conduct its online and facilitated sessions in a manner that promotes health and wellness among students. In the event that you need health and wellness support, you can contact organisations such as:

SA DEPRESSION AND ANXIETY GROUP

24hr Helpline 0800121314 or SMS 31393 (for a call back request)

Website: www.sadac.org

LIFELINE SOUTHERN AFRICA

24-hour crisis intervention service. Offers free, confidential telephone counselling, rape counselling, trauma counselling, Aids counselling, and a range of other services.

National counselling line: 0861-322-322

Website: www.lifeline.org.za

MBSE STUDENT ENROLMENT CONTRACT

By checking this box, you agree to the conditions as set out in this agreement between you and MBSE.

PERSONAL INFORMATION

1. ACCURACY

It is your responsibility to ensure the information you provide to MBSE is correct. If the information is not correct, MBSE has the right to reject your application or cancel your application immediately. MBSE has the right to verify the information that you provide.

2. CONFIDENTIALITY

MBSE agree to keep the information you provide in this document and any other information about you, that we receive from third parties, confidential.

MBSE'S RESPONSIBILITIES

1. MBSE has to inform prospective students of all the requirements and the processes and procedures to be followed on application, registration and for the duration of the student's studies with MBSE.
2. MBSE is responsible for continuous compliance with the requirements of the Department of Higher Education and its Quality Councils in terms of our approved qualifications.
3. MBSE will make available a full prospectus with all the qualifications on offer, providing the information to assist the student to make an informed decision regarding their choice of qualification.
4. MBSE will ensure that information captured on its Learner Management System will be protected and kept confidential.

THE STUDENT'S RESPONSIBILITIES

1. The registered student must adhere to MBSE's Terms and Conditions
2. The student must follow MBSE's policies as they apply to the student and his/ her studies. The policies can be found on MyMBSE or can be requested from our office.
3. The student has to ensure that upon registration for a specific qualification, the student's choice of qualification was based on an informed decision.
4. The student has to sign a declaration on application to confirm the correct selection of his/ her qualification.

STUDENT CODE OF CONDUCT

Moonstone Business School of Excellence (MBSE) offers innovative, value-driven, and flexible training solutions in an online distance learning environment that is inclusive and accessible to all prospective and registered students.

PURPOSE

The Student Code of Conduct states the conduct expected of registered students with MBSE and should be read in conjunction with student-related policies mentioned in this document. The Code of conduct is a guideline to encourage constructive communication and behaviour between MBSE and its students. Any activity on other social networking websites are also subject to the Student Code of Conduct.

STUDENT CONDUCT

- **Responsibility**
Students are responsible for and accountable for their learning achievement and must strive for academic excellence and take pride in their work
- **Respect**
Students must respect MBSE's educational environment, its employees and the rights of fellow students
- **Integrity**
Students must act with honesty and integrity
- **Professionalism**
Students should abide by the policies, procedures rules and regulations of MBSE and act professionally at all times.

COMMUNICATION AND BEHAVIOUR

The following rules must be adhered to by registered students while communicating in, especially, an online platform:

- Any behaviour that amounts to hate speech, stereotyping, foul language or inappropriate comments of any kind is prohibited.
- It is expected that you are respectful to MBSE staff and other students at all times.
- It is your responsibility to ensure that you do not share any personal information such as a telephone number, email address or residential address etc.
- Any behaviour that disrupts the learning environment is prohibited.
- Any behaviour where the students alter or forge any records, forms or documents that are submitted to MBSE will be viewed as serious misconduct.
- Distributing MBSE learning material to any other party will be viewed as a serious misconduct.
- MBSE reserves the right to report incidents of a severe nature to an applicable Government- or Regulatory Body for further action, should it be deemed necessary.

General things to keep in mind when communicating in an online format:

- Think before you post.
- Do not "cyberbully" anyone.
- Use formatting tools sparingly, eg. the use of CAPITAL LETTERS, exclamation marks, red text and bigger font size can be perceived as aggression.

RELATED DOCUMENTS

All students must familiarise themselves with the following MBSE policies relating to the Student Code of Conduct.

- Student Disciplinary Policy
- Grievance Policy
- Appeals Policy
- Terms and Conditions

The documents are available on MyMBSE or on request at help@mbse.ac.za

OUR QUALIFICATIONS

HIGHER EDUCATION



HIGHER CERTIFICATE IN WEALTH MANAGEMENT

(NQF 5)
120 credits
SAQA ID NR. 109175.



ADVANCED CERTIFICATE IN FINANCIAL PLANNING

(NQF 6)
120 credits
SAQA ID NR. 110441

FURTHER EDUCATION QUALIFICATIONS



FURTHER EDUCATION AND TRAINING: SHORT-TERM INSURANCE (INSETA)

(NQF4)
150 credits
SAQA ID NR. 49929/66610



FURTHER EDUCATION AND TRAINING: WEALTH MANAGEMENT (INSETA)

(NQF4)
150 credits
SAQA ID NR. 57917/66613

OCCUPATIONAL QUALIFICATIONS



OCCUPATIONAL CERTIFICATE: COMPLIANCE OFFICER

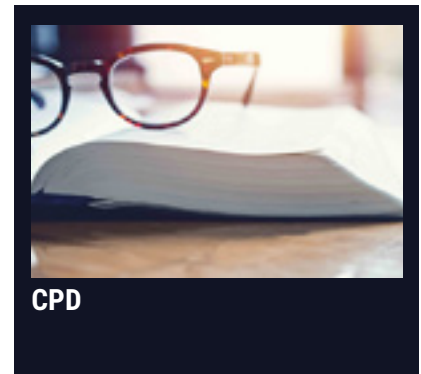
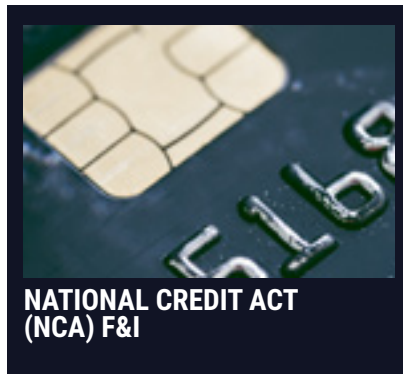
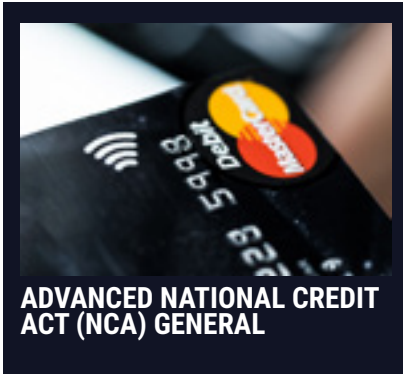
(NQF6)
240 credits
SAQA ID NR. 91671

CIMA



CIMA

SHORT COURSES & CPD



HIGHER CERTIFICATE IN WEALTH MANAGEMENT (NQF 5)

120 credits
(SAQA ID NR. 109175)

DESCRIPTION

The Higher Certificate in Wealth Management (HCWM) provides an ideal entry point into the financial services industry in various roles, or to kickstart your career in financial planning.

The HCWM is recognised by the Financial Services Conduct Authority for all product sub-categories of Category I FSPs, and can be used to fulfil fit and proper requirements for FAIS roles in Category I FSPs.

WHAT WILL THE QUALIFICATION ENABLE YOU TO DO?

Upon successful completion of the HCWM students will be able to:

1. Demonstrate knowledge and understanding of legislation, ethics, and compliance in the context of the financial services sector in South Africa.
2. Demonstrate knowledge and understanding of the financial planning process in terms of collecting, analysing and synthesising appropriate data to develop solutions and make judgments and recommendations that take into consideration client needs and attitudes.
3. Apply a fundamental knowledge of insurance, economics, investment practices, tax and other financial information to match the financial requirements of clients to financial products.
4. Communicate and present information, in writing and verbally, to demonstrate insight into current issues in the Financial Services Sector.

WHO SHOULD APPLY?

- Administrators in financial planning practices, insurance companies, banks and retirement funds;
- Self-employed financial advisors or brokers working under supervision who need a qualification to meet fit and proper requirements;
- Tied agents; or employed personnel rendering intermediary services in a variety of roles.

ADMISSION REQUIREMENTS

Knowledge, comprehension and application of the English language at NQF Level 4 (Grade 12 or equivalent level) is required. Individuals who do not meet the statutory entry requirement for this qualification, can enrol with MBSE for the FETC: Wealth Management Qualification at NQF Level 4, or FETC: Short term Insurance Qualification at NQF Level 4. After successful completion, students can continue with this qualification.

DURATION

Full-time: 1 year

Part-time: 2 years

FEES

Payment is made per module. A discount will apply if the full qualification is paid upfront.

Please contact our office for more information: help@mbse.ac.za

IMPORTANT DATES

Applications:

Applications for Semester 1 close on 25 January 2021

Applications for Semester 2 close on 28 June 2021

Registrations:

Registrations for Semester 1 close on 1 February 2021

Registrations for Semester 2 close on 5 July 2021

METHOD OF TRAINING

Online learning

LEARNING MATERIAL

Students will have online access to their study material which will include a study guide, self-assessments and relevant additional resources.

CONTENT

Students complete four compulsory modules and can choose one of three electives over a two-year period.

Module name	Compulsory / Elective	Credit allocation of Module
Financial Planning Environment Fundamentals Provides an introduction to the financial services sector, its roleplayers and its products, as well as current issues and trends in the sector. The module also provides knowledge and understanding of the main legislation applicable in the context of financial planning; and the important role of ethics in financial planning.	Compulsory	30
Risk Planning Fundamentals Provides knowledge of client life-cycle stages and financial needs with an emphasis on personal risk needs, as well as detailed knowledge of the financial products and financial management strategies that are used to address personal risk planning needs. The module further provides a fundamental understanding of the financial planning process, and the use of a basic capital needs analysis in analysing a client's personal risk needs.	Compulsory	30
Investment and Retirement Planning Fundamentals Provides knowledge of basic economic concepts, client life-cycle stages and financial needs with an emphasis on savings, investment and retirement planning needs, as well as detailed knowledge of the asset classes, financial products and financial management strategies used to address personal investment and retirement planning needs. The module further provides a fundamental understanding of the financial planning process, and the use of a basic capital needs analysis in analysing a client's investment and retirement planning needs.	Compulsory	30
Introduction to Tax in Financial Planning This module provides an introduction to the South African tax system and different direct and indirect taxes that are applicable to individuals and businesses. The module further provides knowledge of the relevant sections of the Income Tax Act, as well as of different forms of business ownership to enable students to complete basic income tax and capital gains tax calculations for individuals and various business entities, and to gain understanding of the tax impacts relating to different financial products.	Compulsory	15
Business Assurance Fundamentals Provides knowledge of different forms of business ownership and their advantages and disadvantages in starting a business. The module also provides knowledge of basic financial statements used in a business, business assurance needs and the different business assurance structures used to address these needs.	Elective	15
Retirement Funds Fundamentals Provides knowledge of the main legislation and tax implications relating to pension fund benefits, as well as detailed knowledge of pension fund products and related group risk products and the benefits provided by these products.	Elective	15
Healthcare Benefits Fundamentals Provides an introduction to the medical scheme and healthcare benefits environment in South Africa. The module provides knowledge of main legislation impacting on and detailed knowledge of health care products.	Elective	15
Total credits:		120

ASSESSMENTS

Students will have to complete online Formative Assessments and a final invigilated written Summative Assessment for each module.

HOW TO APPLY

Navigate to: www.mbse.ac.za to complete an online application.

ACCREDITATION AND CERTIFICATION

Moonstone Business School of Excellence (Pty) Ltd acknowledges that, certification in vocational education and training and the content of the certificate, are regulated by the National Board of Education and governed by the Higher Education Act, 1997 (Act No 101 of 1997) as well as Regulation 1 of the Regulations for the Registration of Private Higher Education Institutions, 2002.

ADVANCED CERTIFICATE IN FINANCIAL PLANNING (NQF 6)

120 credits
SAQA ID Nr. 110441

DESCRIPTION

The Advanced Certificate in Financial Planning (ACFP) provides the skills and knowledge required to provide holistic financial planning services to the 'man in the street' and prepares you for further specialised studies in financial planning. The ACFP also addresses the education requirement to obtain the FINANCIAL SERVICES ADVISOR™ (FSA™) designation awarded by the Financial Planning Institute of South Africa (FPI). Please visit: www.fpi.co.za for more information on 'a career in financial planning'.

WHAT WILL THE QUALIFICATION ENABLE YOU TO DO?

The Advanced Certificate in Financial Planning (ACFP) provides the skills and knowledge required to provide holistic financial planning services to the 'man in the street' and prepares you for further specialised studies in financial planning. The ACFP also addresses the education requirement to obtain the FINANCIAL SERVICES ADVISOR™ (FSA™) designation awarded by the Financial Planning Institute of South Africa (FPI). Please visit: www.fpi.co.za for more information on 'a career in financial planning'.

WHO SHOULD APPLY?

The Advanced Certificate in Financial Planning (ACFP) provides the skills and knowledge required to provide holistic financial planning services to the 'man in the street' and prepares you for further specialised studies in financial planning. The ACFP also addresses the education requirement to obtain the FINANCIAL SERVICES ADVISOR™ (FSA™) designation awarded by the Financial Planning Institute of South Africa (FPI). Please visit: www.fpi.co.za for more information on 'a career in financial planning'.

ADMISSION REQUIREMENTS

The Advanced Certificate in Financial Planning (ACFP) provides the skills and knowledge required to provide holistic financial planning services to the 'man in the street' and prepares you for further specialised studies in financial planning. The ACFP also addresses the education requirement to obtain the FINANCIAL SERVICES ADVISOR™ (FSA™) designation awarded by the Financial Planning Institute of South Africa (FPI). Please visit: www.fpi.co.za for more information on 'a career in financial planning'.

DURATION

Full-time: 1 year
Part-time: 2 years

FEES

Payment is made per module. A discount will apply if the full qualification is paid upfront. Please contact our office for more information: help@mbse.ac.za

IMPORTANT DATES

Applications:

Applications for Semester 1 close on 25 January

Applications for Semester 2 close on 28 June

Registrations:

Registrations for Semester 1 close on 1 February

Registrations for Semester 2 close on 5 July

METHOD OF TRAINING

Online learning

LEARNING MATERIAL

Students will have online access to their study material which will include a study guide, self-assessments and relevant additional resources.

CONTENT

Students complete five compulsory modules over a two-year period.

Module name	Compulsory / Elective	Credit allocation of Module
Financial Planning Environment Enables students to comply with and apply required legal principles to financial planning contexts and discuss current issues and changes, and the impact of such changes in the financial services industry.	Compulsory	20
Business Management Enables students to identify the systems and processes required to start and grow their financial planning practices, as well as put in place mechanisms for risk management and business continuity planning. Students will also be able to explain the importance of ethics and compliance in a financial services environment.	Compulsory	20
Corporate Financial Planning Enables students to evaluate the financial statements of a business in order to determine business assurance needs with specific reference to its structure, implementation, tax consequences and legal requirements. Students will also be able to explain the structure and workings of the different types of employee benefits, and to demonstrate an understanding of the South African healthcare system and its challenges.	Compulsory	20
Personal Financial Planning Provides the required skills and knowledge on time value of money calculations, the financial planning process, financial needs of individual clients and knowledge on tax and legislation to enable students to advise individual clients on taxation, personal financial management, personal risk and estate planning, investment planning and retirement planning needs in a particular scenario, as well as provide recommendations on appropriate instruments and products available to meet those needs.	Compulsory	40
Financial Planning Case Study Provides students with the ability to consolidate their skills and knowledge from the other modules in this programme and apply the technical knowledge of financial planning to client scenarios in order to make recommendations and give advice.	Compulsory	20
Total credits:		120

ASSESSMENTS

Students will have to complete online Formative Assessments and a final invigilated written Summative Assessment.

HOW TO APPLY

Navigate to: www.mbse.ac.za to complete an online application.

ACCREDITATION AND CERTIFICATION

Moonstone Business School of Excellence (Pty) Ltd acknowledges that, certification in vocational education and training and the content of the certificate, are regulated by the National Board of Education and governed by the Higher Education Act, 1997 (Act No 101 of 1997) as well as Regulation 1 of the Regulations for the Registration of Private Higher Education Institutions, 2002 (hereafter referred to as “the Regulations”).

Institutional vocational education and training

Students are awarded a qualification certificate upon the successful completion of all the studies required for the qualification.

A student resigning without completing the qualification is given a certificate of resignation, which lists the completed studies and their grades. On request, students may also be granted a certificate of completed studies while still continuing the programme. The specific qualification certificate will be issued by Moonstone Business School of Excellence.

FURTHER EDUCATION AND TRAINING (FETC): SHORT-TERM INSURANCE (NQF 4)

150 credits
(SAQA ID NR. 49929/66610)

DESCRIPTION

The qualification covers Short-term related learning and provides a framework for students to develop competencies that will give them insight into the Short-term insurance sub-sector. It introduces a basic understanding of the key terms, rules, concepts and principles of the fields that will ready them for the industry.

WHAT WILL THE QUALIFICATION ENABLE YOU TO DO?

1. Students who advise Short-term Commercial or Personal lines products.
2. Carry out basic research, information gathering, analysis and communicate it to a larger audience.
3. Offer advice in terms of current Determination of Fit and Proper Requirements for Financial Services providers.
4. Knowledge about behaviour and ethics in a work-place environment, managing personal finance and tax.

WHO SHOULD APPLY?

Students employed in the Short-term insurance industry and who give advice on Personal lines and or Commercial line business.

ADMISSION REQUIREMENTS

Students must be able to read and write.

DURATION

3 to 6 months per Skills Programme

FEES

Payment is made per Skills Programme.

Please contact our office for more information: help@mbse.ac.za

IMPORTANT DATES

Applications:

Applications are open throughout the year.

METHOD OF TRAINING

Online learning (Material and submission will be done online)

- No classroom training will be available.
- Student support and interaction will be via tutors online and in the form of webinars, discussions or chat groups.
- Learning material will be made available on MyMBSE.
- The Portfolio of Evidence (POE) must be completed on our Learning Management System or uploaded.
- The Summative Assessments will be done in one of our examination centres nationally (paper based).
- Timeline will be adapted for each individual student.

Facilitated learning

- Classroom training will be arranged (for 15 students or more).
- Learning material will be sent either as hard copy prior to training or will be made available at training.
- This material must be brought to classroom training sessions.
- During training the learning material will be discussed and students will start with the completion of the Portfolio of Evidence (POE).
- This can be couriered to our offices at your own cost.
- The Summative Assessments will be done in one of our examination centres nationally.

LEARNING MATERIAL

- Learning material is developed for outcome-based training and is developed in conjunction with industry requirements.
- Learning material is continuously updated with any changes in the marketplace.
- Learning material is easy to access and easy to understand without facilitation. The Learning material is only available in English.

CONTENT

The full qualification of 150 credits is divided into Skills Programmes of approximately 30 credits each:

- Each Skills Programme is an independent programme and one can enrol at any time for a Skills Programme.
- This qualification is unit standard-based: Students will receive credits for each Skills Programme they finish i.e. you do not have to finish the full qualification to receive credits.
- At least three Skills Programmes are compulsory.
- Two of the Skills Programmes are mathematics or mathematics literacy and communication literacy: students with a grade 12 certificate with mathematics and two languages present, will be granted possible exemption.
- Students must choose between the Personal Lines and Commercial Lines Skills Programme.

SKILLS PROGRAMME 1 Personal Lines				
CODE	US/TITLE	CREDITS	LEVEL	TYPE
120008	Demonstrate knowledge and understanding of the insurance of pleasure craft	3	4	E
120011	Apply knowledge of personal all risks insurance	2	4	E
120015	Demonstrate knowledge and understanding of house owners insurance	3	4	E
120016	Apply knowledge insurance of household contents	4	4	E
120118	Underwrite a standard risk in Short-term personal insurance	6	4	E
120123	Process a Short-term insurance claim	3	4	E
120132	Apply knowledge of personal liability insurance	3	4	E
120136	Apply knowledge of Short-term Insurance to reinsurance	5	4	E
9302	Access information in order to respond to client enquiries in a financial services environment	2	3	E
		31		

OR

SKILLS PROGRAMME 1 Commercial Lines				
CODE	US/TITLE	CREDITS	LEVEL	TYPE
9302	Access information in order to respond to client enquiries in a financial services environment	2	3	E
120110	Underwrite a standard risk in Short-term commercial insurance	10	4	E
120115	Apply technical knowledge and understanding of business insurance	10	4	E
120122	Apply knowledge of Short-term Insurance to the All Risks section of a commercial policy	2	4	E
120123	Process a Short-term insurance claim	3	4	E
120136	Apply knowledge of Short-term Insurance to reinsurance	5	4	E
		32		

SKILLS PROGRAMME 2 Personal and Commercial Lines				
CODE	US/TITLE	CREDITS	LEVEL	TYPE
114985	Indicate how different needs lead to the development of different Financial Service products	4	3	C
117117	Describe standard insurance cover in terms of SASRIA	4	4	C
117127	Describe and apply the basic principles of personal income tax	3	4	F
117156	Interpret basic financial statements	4	4	F
117158	Investigate ways of managing financial risk in own lives	5	4	F
119265	Manage risk in own work environment	2	4	C
120121	Apply technical knowledge and understanding of the cover provided under a Short-term Multi-Peril Insurance policy	5	4	C
120124	Demonstrate knowledge of insurable risk	3	4	C
120128	Apply the law of contract to insurance	3	4	C
		33		

SKILLS PROGRAMME 3 Personal and Commercial Lines				
CODE	US/TITLE	CREDITS	LEVEL	TYPE
13940	Demonstrate knowledge and application of ethical conduct in a business environment	4	4	C
120019	Analyse new developments reported in the media that could impact on Short-term insurance	10	4	C
120005	Demonstrate knowledge and understanding of personal motor insurance	4	4	C
119676	Apply the skills of customer care in a specific work environment	4	4	C
117133	Manage own work performance in relation to an organisation's performance management system	2	3	C
114943	Describe how to manage workplace relationships	2	3	C
113911	Use an electronic system as a tool in a financial services context	2	3	C
120127	Demonstrate knowledge and understanding of issues of compliance and non-activity that could result in civil or criminal liability in terms of business law	2	4	C
12164	Demonstrate knowledge and insight of the Financial Advisory and Intermediary Services Act (FAIS) (Act 37 of 2002)	2	4	E
		32		

SKILLS PROGRAMME 4 Mathematics				
CODE	US/TITLE	CREDITS	LEVEL	TYPE
7468	Use mathematics to investigate and monitor the financial aspects of personal, business, national and international issues	6	4	F
9015	Apply knowledge of statistics and probability to critically interrogate and effectively communicate findings on life related problems	6	4	F
9016	Represent analyse and calculate shape and motion in 2-and 3-dimensional space in different contexts	4	4	F
		16		

***Note on Skills Programme 4:** Students who passed mathematics or mathematical literacy as a subject in Grade 12 may be granted 16 credits through concession against these fundamental unit standards at Levels 3 and 4.

SKILLS PROGRAMME 5 Communication & Additional South African Language				
CODE	US/TITLE	CREDITS	LEVEL	TYPE
8969	Interpret and use information from texts	5	3	F
8976	Write for a wide range of contexts	5	4	F
8974	Engage in sustained oral communication and evaluate spoken texts	5	4	F
8970	Write texts for a range of communicative contexts	5	3	F
8973	Use language and communication in occupational Learning Programme	5	3	F
8975	Read, analyse and respond to a variety of texts	5	4	F
8979	Use language and communication in occupational Learning Programme	5	4	F
8968	Accommodate audience and context needs in oral communication	5	3	F
		40		

***Note on Skills Programme 5:** Students who passed English as a first language as a subject in Grade 12 may be granted 20 credits through concession against the Communication Unit standards at levels 3 and 4. Students who passed an additional South African Language other than the language of business (English) as a first, second or third language as a subject in Grade 12 may be granted 20 credits through concession against the Communication Unit standards required as a second language at level 3.

Skills Programme 1 - Compulsory

Personal Lines

(31 credits)

The majority of this Skills Programme mainly consist of legislation, customer care, relationship building, and ethical conduct. A student will have the knowledge, and understanding of, 'insurance of pleasure craft', house owner insurance, household content, personal liability insurance, reinsurance and how to process Short-term insurance claims.

OR

Skills Programme 1 - Compulsory

Commercial Lines

(32 credits)

The majority of this Skills Programme are electives. A student will learn to underwrite standard risk in Commercial Lines and have a good knowledge base of business insurance, all risk section of business insurance and Short-term reinsurance. They will also have an understanding of how to process a Short-term insurance claim.

Skills Programme 2 - Compulsory

(33 credits)

Students will:

- Have knowledge of SASRIA and personal sales tax.
- Interpret basic financial statements.
- Manage financial risk personally and in the workplace.
- Apply and understand the cover provided under a Multi-Peril insurance policy and the law of contract to insurance.

Skills Programme 3 - Compulsory

(32 credits)

Students will demonstrate knowledge and understanding of personal motor insurance and ethical conduct, as well as analyse new developments that could impact on ST insurance, compliance services, customer care, use of an electronic system in ST insurance and an insight of the FAIS act.

Skills Programme 4 - Elective

Mathematics

(16 credits)

Students who have passed mathematics in grade 12 will possibly be granted exemption.

If you are not granted exemption, you will learn to apply knowledge of statistics and probability and use mathematics to investigate and monitor the financial aspects of personal/ business issues.

Skills Programme 5 - Elective

Communication and additional SA Language

(40 credits)

Students who have passed two languages in grade 12 will possibly be granted exemption.

If you are not granted exemption, you will learn to read, interpret and use information from texts as well as write and engage in oral communication.

ASSESSMENTS

After completion of the Portfolio of Evidence, the students will upload it on MyMBSE for assessment. Once assessed and the student is found competent in all the Formative Assessments, MBSE will contact the candidate to arrange for a closed-book Summative Assessment.

- Additional assignments will be handed in on the day of the Summative Assessment.
- Should the candidate be unsuccessful in the Portfolio of Evidence, MBSE will contact the candidate to apply for a resubmission on this POE.
- Once Competent MBSE will arrange for the Summative Assessment.

HOW TO APPLY

Navigate to: www.mbse.ac.za to complete an online application.

ACCREDITATION AND CERTIFICATION

The Qualification consist of Fundamental, Core and Elective Components. To be awarded the Qualification, students are required to obtain a minimum of 150 credits in line with the component requirements. INSETA is responsible for the issuing of the FETC Short Term (NQF 4) certificates to learners who successfully completed the Qualification. Certification will occur as soon as all the relevant unit standards toward the qualification have been completed, verified and endorsed by INSETA and uploaded onto the National Learner Records Database (NLRD).

FURTHER EDUCATION AND TRAINING (FETC): WEALTH MANAGEMENT (NQF 4)

150 credits at
(SAQA ID NR. 57917/66613)

DESCRIPTION

The Qualification is a holistic introduction to Wealth Management and Wealth Creation. It enables intermediaries to understand the Wealth Management environment, the legislative requirements and product-related information. Our qualification is aimed at students with less than four years' experience, newcomers to the industry, or those who have lots of experience, but would like to brush up on their product knowledge. We developed the Skills Programmes, covered in this qualification, to provide intermediaries with more options to comply with the requirements of the FAIS Act.

WHAT WILL THE QUALIFICATION ENABLE YOU TO DO?

1. Sell Long Term Cat A products (assistance policies including funeral policies), Long Term B1 and B2.
2. Sell risk policies and guaranteed investments/ savings, recurring policies and annuities other than single premium annuities.

WHO SHOULD APPLY?

Students who require licensing in funeral plans, risk policies, long term B and guaranteed investments.

ADMISSION REQUIREMENTS

- This qualification is suitable for students who have schooling at/or below NQF 4 (grade 12 certificate).
- Our programme is aimed at student's with less than four years' experience, newcomers to the industry, or those who have lots of experience, but would like to brush up on their product knowledge.
- No admission requirements.
- Students must be able to read and write.
- Students will receive an equivalent qualification to a grade 12 certificate.

DURATION

3 to 6 months per Skills Programme

FEES

Payment is made per Skills Programme. A discount will apply if the full qualification is paid upfront.
Please contact our office for more information: help@mbse.ac.za

IMPORTANT DATES

Applications:

Applications are open throughout the year.

METHOD OF TRAINING

Online learning (Material and submission will be done online)

- No classroom training will be available.
- Students support and interaction will be via tutors online and in the form of webinars, discussions or chat groups.
- Learning material will be made available on MyMBSE.
- The Portfolio of Evidence (POE) must be completed on our Learning Management System or uploaded.
- The Summative Assessments will be done in one of our examination centres nationally (paper based).
- Timeline will be adapted for each individual student.

Facilitated learning

- Classroom training will be arranged (for 15 students or more).
- Learning material will either be sent by hard copy prior to training or will be made available at the training session.
- This material must be brought to classroom training sessions.
- During training the learning material will be discussed and students will start with the completion of the Portfolio of Evidence (POE).
- This can be couriered to our offices at your own cost.
- The Summative Assessments will be done in one of our examination centres nationally.

LEARNING MATERIAL

- Learning material is developed for outcome-based training and is developed in conjunction with industry requirements.
- Learning material is continuously updated with any changes in the market place.
- Learning material is easy to access and easy to understand without facilitation.
- Learning material only available in English.

CONTENT

The full qualification of 150 credits is divided into Skills Programmes of approximately 30 credits each:

- Each Skills Programme is an independent programme and one can enrol at any time for these Skills Programmes.
- This qualification is unit standard based: students will receive credits for each Skills Programme they finish i.e. you do not have to finish the full qualification to receive credits.
- At least three Skills Programmes are compulsory.
- Two of the Skills Programmes are mathematics/mathematics literacy and communication literacy: students with a grade 12 certificate with mathematics and two languages present, will be granted possible exemption.

SKILLS PROGRAMME 1				
CODE	US/TITLE	CREDITS	LEVEL	TYPE
242584	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	2	4	E
242593	Explain South African money laundering legislation and the implications for accountable institutions in transacting with clients	3	4	C
119676	Apply skills of customer care in a specific work environment	4	4	E
243137	Demonstrate skills and techniques required to build a relationship with a client in a financial services environment	3	4	E
242655	Demonstrate knowledge and understanding of ethical conduct in a business environment	4	4	C
117129	Apply the regulations for disclosure required that are required as part of the financial sales process	2	4	E
120128	Apply the law of contract to insurance	3	4	E
114966	Explain the types of compulsory statutory insurance in South Africa	2	3	E
117126	Apply knowledge and insight into aspects of the Long-term insurance Act, Act 52 of 1998	2	4	E
114985	Indicate how different needs lead to the development of different Financial Services products	4	3	E
114956	Describe funeral insurance	2	3	E
		31		

SKILLS PROGRAMME 2				
CODE	US/TITLE	CREDITS	LEVEL	TYPE
114970	Manage risk in own life	3	3	C
114960	Investigate the need to provide financially for own retirement	3	3	C
117137	Describe group insured benefits	2	4	E
119478	Analyse the different products available in the Long-term industry and the benefits of each	5	4	E
120124	Demonstrate knowledge of insurable risk	3	4	E
243131	Describe disability insurance solutions in the context of financial planning	4	4	E
243139	Investigate dread disease products and their place in wealth management	2	4	E
243133	Analyse current events reported in the media that could impact on wealth management	10	4	C
		32		

SKILLS PROGRAMME 3

CODE	US/TITLE	CREDITS	LEVEL	TYPE
117127	Describe and apply the basic principles of personal income tax	3	4	F
117132	Explain basic economics	3	3	C
117156	Interpret basic financial statements	4	4	F
117158	Investigate ways of managing financial risk in own lives	5	4	F
243134	Investigate the range of options available for wealth management	5	4	C
243142	Explain Capital Markets and Capital Market Instruments	2	4	C
243144	Explain the structure of the financial services industry in South Africa	4	3	C
243148	Explain Equity Markets and equity market instruments	2	4	C
243153	Explain basic investment principles	4	4	C
243154	Explain money markets and money market instruments	2	4	C
		34		

SKILLS PROGRAMME 4 Mathematics

CODE	US/TITLE	CREDITS	LEVEL	TYPE
7468	Use mathematics to investigate and monitor the financial aspects of personal, business, national and international issues	6	4	F
9015	Apply knowledge of statistics and probability to critically interrogate and effectively communicate findings on life related problems	6	4	F
9016	Represent analyse and calculate shape and motion in 2-and 3-dimensional space in different contexts	4	4	F
		16		

***Note on Skills Programme 4:** Students who passed mathematics or mathematical literacy as a subject in Grade 12 may be granted 16 credits through concession against these fundamental unit standards at Levels 3 and 4.

SKILLS PROGRAMME 5 Communication & Additional South African Language

CODE	US/TITLE	CREDITS	LEVEL	TYPE
119457	Interpret and use information from texts	5	3	F
119459	Write/present/sign for a wide range of contexts	5	4	F
119462	Engage in sustained oral/signed communication and evaluate spoken/signed texts	5	4	F
119465	Write/present/sign texts for a range of communicative contexts	5	3	F
119467	Use language and communication in occupational learning program	5	3	F
119469	Read/view, analyse and respond to a variety of texts	5	4	F
119471	Use language and communication in occupational learning program	5	4	F
119472	Accommodate audience and context needs in oral/signed communication	5	3	F
		40		

***Note on Skills Programme 5:** Students who passed English as a first language as a subject in Grade 12 may be granted 20 credits through concession against the Communication Unit standards at levels 3 and 4. Students who passed an additional South African Language other than the language of business (English) as a first, second or third language as a subject in Grade 12 may be granted 20 credits through concession against the Communication Unit standards required as a second language at level 3.

Skills Programme 1 - Compulsory

(31 credits)

The majority of this Skills Programme mainly consist of legislation like FAIS, FICA, Law of contract, Long Term Insurance Act (LTIA) and compulsory statutory insurance. Students will learn to apply skills of customer care, client relationships, needs analyses and funeral insurance.

Skills Programme 2 - Compulsory

(32 credits)

Students will demonstrate knowledge and understanding of insurable risk, describe group insured benefits and disability insurance solutions, analyse long-term products and the benefits of each and how current events in the media, could impact wealth management.

Skills Programme 3 - Compulsory

(34 credits)

Students will have the knowledge to explain basic economics, capital markets and instruments, equity markets, basic investment principles, money markets and instruments. They will learn to investigate a range of options available for wealth management, describe and apply the basic principles.

Skills Programme 4 - Elective

Mathematics

(16 credits)

Students who have passed mathematics in grade 12 will possibly be granted exemption. If you are not granted exemption, you will learn to apply knowledge of statistics and probability as well as use mathematics to investigate and monitor the financial aspects of personal/ business issues.

Skills Programme 5 - Elective

Communication and additional SA Language

(40 credits)

Students who have passed two languages in grade 12 will possibly be granted exemption. If you are not granted exemption, you will learn to read, interpret and use information from texts as well as write and engage in oral communication.

ASSESSMENTS

After completion of the Portfolio of Evidence, the students will either courier the proof of evidence to the Assessor or upload on LMS for assessment. Once assessed and the students is found Competent in all the Skills Programmes, MBSE will contact the candidate to arrange for a closed-book Summative Assessment.

- Additional assignments will be handed in on the day of the Summative Assessment.
- Should the candidate be unsuccessful in the Skills Programmes on the Portfolio of Evidence, MBSE will contact the candidate to apply for a rewrite on these Skills Programmes.

Once Competent MBSE will arrange for the Summative Assessment.

HOW TO APPLY

Navigate to: www.mbse.ac.za to complete an online application.

ACCREDITATION AND CERTIFICATION

The Qualification consist of Fundamental, Core and Elective Components. To be awarded the Qualification, students are required to obtain a minimum of 150 credits in line with the component requirements. Certification will occur as soon as all the relevant unit standards toward the qualification have been completed, verified and endorsed by INSETA and uploaded onto the INSETA Indicium System.

OCCUPATIONAL CERTIFICATE: COMPLIANCE OFFICER (NQF 6)

240 credits
(SAQA ID NR. 91671)

DESCRIPTION

Compliance Officers generally provide compliance services to the management of a company, to assist them in discharging their responsibilities in complying with various regulatory, and legislative requirements.

Every company and organisation is required to comply with these various regulations, thus they need an expert at their disposal with knowledge and experience in legal matters, compliance risk management, as well as the compilation, implementation and reporting of compliance strategies.

Moonstone Business School of Excellence's Occupational Certificate: Compliance Officer (NQF level 6) qualification equips our students with these expert skills, and practical experience. This gives the student confidence in their own working abilities, and advance their career.

WHAT WILL THE QUALIFICATION ENABLE YOU TO DO?

Qualified students will be able to conduct Enterprise-wide Risk Management, apply compliance principles, commit to the compliance practices, design and implement various compliance plans and strategies, conduct compliance monitoring, and interact with various industry role-players.

Our qualification is not just aimed at preparing a student for compliance within the financial sector, but also compliance departments from other sectors.

This occupational qualification will form the apex of the compliance functionary learning path, and will allow access to the Integrated External Summative Assessment (EISA) with the Compliance Institute of South Africa (CISA).

This qualification is a recognised qualification by the Financial Services Conduct Authority (FSCA) for Category I, Key Individuals

WHO SHOULD APPLY?

- Any current Compliance Officer
- Any prospective Compliance Officers, under supervision of, or in contractual agreement with an existing Compliance Officer (with five or more years of compliance experience).

ADMISSION REQUIREMENTS

Matric/Grade 12 or a recognised NQF Level 4 qualification.

Work under supervision of, or in contractual agreement with, an existing Compliance Officer.

FEES

Payment is made per semester. A discount will apply if the full qualification is paid upfront.

Please contact our office for more information: help@mbse.ac.za

COMPLIANCE INSTITUTE OF SOUTHERN AFRICA (CISA) FEES

The fee for the External Integrated Summative Assessment is not included in the MBSE tuition fees, and is payable directly to CISA. Please contact our office for more information: help@mbse.ac.za

IMPORTANT DATES

Applications:

Applications for Semester 1 close on 25 January

Applications for Semester 2 close on 28 June

Registrations:

Registrations for Semester 1 close on 1 February

Registrations for Semester 2 close on 5 July

METHOD OF TRAINING

Online learning

LEARNING MATERIAL

Students will have online access to their study material which will include a study guide, videos, self-assessments and relevant additional resources.

CONTENT

The qualification consists of the following Theory, Practical and Workplace Modules:

Module Code	Module Name	Credits
CO KM01	Enterprise-wide Risk Management	6
CO KM05	Project Management	3
CO KMO2	Compliance Principles	12
CO PM01	Design and Implement compliance Risk Management Frameworks	9
CO PM06	Interact with Industry Role Players	3
CO KM06	Generic Management Principles	3
CO KM04	Change Management	6
CO PM02	Define, Maintain and Advise on the Regulatory Universe	12
CO PM03	Develop, Facilitate Compilation of and Review Compliance Risk Management Plans	12
CO PM04	Conduct Compliance Monitoring	12
CO PM05	Compile and submit internal and external compliance report	12
CO KM03	Compliance Practice	30
CO WM01	Compliance Risk Management Design and Implementation Processes	18
CO WM02	Regulatory Universe Definition and Maintenance Processes	24
CO WM03	Compliance Risk Management Plan Development Processes	24
CO WM04	Compliance Monitoring Processes	24
CO WM05	Compliance Reporting Processes	24
CO WM06	Industry Regulator, Supervisor and Stakeholder Interactions	6

Students may progress through each module at their own pace; however, they need to stay within the overall time-frame of the semester. A schedule is provided at the start of each semester.

Module Code	Module Name	Credits
Semester 1		
CO KM01	Enterprise-wide Risk Management	6
CO KM05	Project Management	3
Semester 2		
CO KM02	Compliance Principles	12
CO PM01	Design and Implement Compliance Risk Management Frameworks	9
CO PM06	Interact with Industry Role Players	3
Semester 3		
CO KM06	Generic Management Principals	3
CO KM04	Change Management	6
Semester 4		
CO PM02	Define, Maintain and Advise on the Regulatory Universe	12
CO PM03	Develop, Facilitate Compilation of and Review Compliance Risk Management Plans	12
CO PM04	Conduct Compliance Monitoring	12
CO PM05	Compile and submit internal and external compliance reports	12
CO KM03	Compliance Practice	30
Workplace Modules		
CO WM01	Compliance Risk Management Design and Implementation Processes	18
CO WM02	Regulatory Universe Definition and Maintenance Processes	24
CO WM03	Compliance Risk Management Plan Development Processes	24
CO WM04	Compliance monitoring Processes	24
CO WM05	Compliance Reporting Processes	24
CO WM06	Industry Regulator, Supervisor and Stakeholder Interactions	6
Total credits:		240

ASSESSMENTS

Students will have to successfully complete online Formative Assessments and Workplace Based Assignments to be found Competent and to gain entry into the External Integrated Summative Assessment, set by Compliance Institute of Southern Africa.

HOW TO APPLY

Navigate to: www.mbse.ac.za to complete an online application. Please have these documents ready when applying:

- Certified copy of your Matric/Gr 12 or NQF level 4 equivalent;
- Certified copy of any other qualification you hold;
- Certified copy of your ID/Passport;
- Up-to-date CV

ACCREDITATION AND CERTIFICATION

Moonstone Business School of Excellence (Pty) Ltd acknowledges that certification in vocational education and training and the content of the certificate are regulated by the National Board of Education and governed by the SAQA Act, 1995 (Act No 58 of 1995) as well as Regulation 1 of the Regulations for the Registration of Private Higher Education Institutions, 2002 (hereafter referred to as “the Regulations”).

Institutional vocational education and training

Students are awarded an Occupational Certificate, issued by the Quality Council of Trades and Occupations (QCTO), upon the successful completion of the EISA which will be set by the Compliance Institute of Southern Africa (CISA).

CIMA TUITION

DESCRIPTION

CIMA is the world's largest professional body of chartered global management accountants, and offer the most relevant accounting qualifications for a career in business and finance.

CIMA has more than 229 000 members and students in 176 countries.

CAREER OPTIONS

Information management roles

- Business Analysis Manager
- Head of Programme Management
- Director of Information Technology

Finance roles

- Finance Director
- Finance Business Partner
- Management Accountant

Executive roles

- Chief Executive
- Managing Director
- Chief Financial Officer

Commercial roles

- Commercial Director
- Marketing Manager
- Management Consultant

Operations roles

- Human Resources Manager
- Project Manager
- Operations Director

WHO SHOULD APPLY?

Ambitious school leavers, graduates and working professionals choose CIMA as the most relevant global qualification for a career in business. CIMA's flexible entry policy gives anyone with a passion for business the chance to study CIMA regardless of their educational background. All you need is a good grasp of maths and English.

At Moonstone Business School of Excellence, we endeavour to tailor the tuition to suit your needs, from full time classes offered during working hours to part-time classes offered over weekends or on weekday evenings.

Please contact our office for more information: help@mbse.ac.za

ADMISSION REQUIREMENTS

Certificate in Business Accounting

- No entry requirements.

CIMA's Professional Qualification

- The Certificate in BA with CIMA, or
- A Relevant Accounting or Finance Qualification.

DURATION

There will be 30 hours of contact time

FEES

Please contact our office for more information: help@mbse.ac.za

IMPORTANT DATES

Applications are open throughout the year.

METHOD OF TRAINING

The CIMA Tuition will be through Facilitated Learning, which will include Revision Sessions and Mock Exams under Exam Conditions

LEARNING MATERIAL

Students will receive the Kaplan Study Texts.

CONTENT



We offer tuition for all 16 subjects. Students will start at the Certificate Level (at the bottom) and work their way up to the Strategic Level

ASSESSMENTS

At MBSE students have the opportunity to complete Mock Assessments in preparation for the Exam to be written with CIMA.

ACCREDITATION AND CERTIFICATION

MBSE is an accredited Tuition Provider with CIMA. Certification takes place after successful completion of each level of studies. Certificates are issued by CIMA.

CLASS OF BUSINESS - COB

- 
1. Short-term insurance: Personal lines
 2. Short-term insurance: Commercial lines
 3. Long-term Insurance
 4. Pension Fund Benefits
 5. Short-term and Long-term Deposits
 6. Structured Deposits
 7. Investments
 8. Forex Investments
 9. Health Services Benefits

ADVANCED NATIONAL CREDIT ACT (NCA) GENERAL

DESCRIPTION

The National Credit Act No 34 of 2005 was passed by Parliament on the 10th of March 2006. It is designed to achieve a system of regulation that will apply to all credit activities, thereby ensuring that all credit providers and credit consumers are treated equally.

Broadly, the Act aims to reduce reckless credit behaviour, both by credit providers and consumers and the level of over-indebtedness in South Africa.

WHAT WILL THE QUALIFICATION ENABLE YOU TO DO?

Successful students will qualify for an NCA card.

WHO SHOULD ATTEND?

- Employees of Credit providers (providers of personal loans, HP agreements, credit cards and revolving credit)
- Employees of Credit Bureaus
- Debt Counsellors

ADMISSION REQUIREMENTS

No admission requirements.

FEES

No admission requirements.

DURATION

6 Months

IMPORTANT DATES

No admission requirements.

METHOD OF TRAINING

Online learning

- No classroom training will be available.
- Learner support and interaction will be via tutors online and in the form of webinars, discussions or chat groups.
- Learning material will be made available on the Learning Management System (LMS).

LEARNING MATERIAL

Students will have online access to their study material which will include a study guide, self-assessments and relevant additional resources.

CONTENT

Learning programme 1 | An overview of the act

Have an understanding of the purpose and relevance of the National Credit Act (NCA).

Have an understanding of the requirements with regard to the enforcement of the NCA.

Have an understanding of the regulation of the consumer credit industry.

Learning programme 2 | Consumer credit institutions name

Recognise the purpose and functioning of the National Credit Regulator.

Recognise the purpose and functioning of the National Consumer Tribunal.

Learning programme 3 | Credit agreements

Identify the categories of credit agreements.

Have an understanding of the disclosure, form and effect of credit agreements.

Have an understanding of unlawful credit agreements and unlawful provisions in credit agreements.

Have an understanding of the costs with regard to credit agreements.

Have an understanding of the requirements with regard to statement of account.

Have an understanding of the alteration, rescission and termination of a credit agreement.

Learning programme 4 | Consumer rights

Have an understanding of the consumer's right with regards to credit.

Have an understanding of the consumer's right with regards to confidentiality, personal information and credit records.

Examine the requirements with regards to credit marketing practices and advertising.

Learning programme 5 | Over-indebtedness and reckless credit

Have an understanding of the concept of over-indebtedness and reckless credit.

Learning programme 6 | Collection, repayment, surrender and debt enforcement

Requirements with regards to repayment practices

Requirements with regards to the surrender of goods

Requirements with regards to the debt enforcement by repossession or judgement

Learning programme 7 | Complaints and disputes

Evaluate the requirements with regards to dispute settlement.

ASSESSMENTS

1. After studying the material, the learner will complete an online Final Assessment.
2. Learners need to obtain 60% to be competent

HOW TO APPLY

Applications are open throughout the year. The learner will receive the learning material online after registration and proof of payment is sent to our office.

ACCREDITATION AND CERTIFICATION

- Learners will receive a MBSE certificate after successful completion of the course.
- They will also receive a NCA card that is necessary for Finance and Insurance brokers (F&I).

NATIONAL CREDIT ACT (NCA) FINANCE & INSURANCE

DESCRIPTION

The National Credit Act No 34 of 2005 was passed by Parliament on the 10th of March 2006. It is designed to achieve a number of objectives, most of which are to benefit and protect the consumer. The aim is to introduce a single, functional system of regulation that will apply to all credit activities, thereby ensuring that all credit providers and credit consumers are treated equally.

Broadly, the Act aims to reduce reckless credit behaviour, both by credit providers and consumers and the level of over-indebtedness in South Africa.

WHAT WILL THE QUALIFICATION ENABLE YOU TO DO?

Successful students will qualify for an NCA card.

WHO SHOULD APPLY?

Credit providers – motor industry

ADMISSION REQUIREMENTS

No admission requirements.

FEES

Please contact our office for more information: help@mbse.ac.za

DURATION

6 Months

IMPORTANT DATES

Applications:

Applications are open throughout the year.

METHOD OF TRAINING

Online learning

- No classroom training will be available.
- Learner support and interaction will be via tutors online and in the form of webinars, discussions or chat groups.
- Learning material will be made available on the Learning Management System (LMS).

LEARNING MATERIAL

Students will have online access to their study material which will include a study guide, self-assessments and relevant additional resources.

CONTENT

Learning programme 1 | An overview of the act

Have an understanding of the purpose and relevance of the National Credit Act (NCA).
 Have an understanding of the requirements with regard to the enforcement of the NCA.
 Have an understanding of the regulation of the consumer credit industry.

Learning programme 2 | Consumer credit institutions name

Recognise the purpose and functioning of the National Credit Regulator.
 Recognise the purpose and functioning of the National Consumer Tribunal.

Learning programme 3 | Credit agreements

Identify the categories of credit agreements.
 Have an understanding of the disclosure, form and effect of credit agreements.
 Have an understanding of unlawful credit agreements and unlawful provisions in credit agreements.
 Have an understanding of the costs with regard to credit agreements.
 Have an understanding of the requirements with regard to statement of account.
 Have an understanding of the alteration, rescission and termination of a credit agreement.

Learning programme 4 | Consumer rights

Have an understanding of the consumer's right with regards to credit.
 Have an understanding of the consumer's right with regards to confidentiality, personal information and credit records.
 Examine the requirements with regards to credit marketing practices and advertising.

Learning programme 5 | Over-indebtedness and reckless credit

Have an understanding of the concept of over-indebtedness and reckless credit.

Learning programme 6 | Complaints and disputes

Evaluate the requirements with regards to dispute settlement.

ASSESSMENTS

1. After studying the material, the learner will complete a Final Assessment, electronically.
2. 60% is required to pass.

HOW TO APPLY

Applications are open throughout the year. The learner will receive the learning material online after registration and proof of payment is sent to our office.

ACCREDITATION AND CERTIFICATION

- Learners will receive a MBSE certificate after successful completion of the course.
- They will also receive a NCA card that is necessary for Finance and Insurance brokers (F&I).

CONTINUOUS PROFESSIONAL DEVELOPMENT - CPD

Course Name	CPD hours (if applicable)	Course Name	CPD hours (if applicable)
Anti-Bribery How to be corruption free	3.15	Protecting your Information	2.5
Automotive Finance and Insurance Customer Service	1.5	Refresher Forex Investments	5.0
Basic Compliance for your practice	6.0	Refresher Forex Investments + Financial Services Overview	8.5
Business Assurance Fundamentals	6.5	Refresher Health Services Benefits	6.0
Business continuity, disaster recovery and succession planning	2.5	Refresher Health Services Benefits + Financial Services Overview	9.5
Coaching and mentoring skills for FAIS Supervisors	6.5	Refresher Investments	5.0
Compliance advice	4.5	Refresher Investments + Financial Services Overview + Economic and Investment Overview	15
Compliance Practice and legislation	6.0	Refresher Long-Term Insurance	6.5
Compliance Principles of Materiality	3.5	Refresher Long-Term Insurance + Financial Services Overview + Economic and Investment Overview	13
Compliance Programme	3.5	Refresher Pension Fund Benefits	6.0
Compliance regulatory environment developing a CRMP	7.5	Refresher Pension Fund Benefits + Financial Services Overview + Economic and Investment Overview	12.5
Compliance risk management Process	3.5	Refresher Short-term & Long-term Deposits	5.0
Customer service and building relationships for financial advisors	4.5	Refresher Short-term & Long-term Deposits + Financial Services Overview	8.5
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