Cornerstone Performance Solutions

NQF LEVEL 6

PROGRAMME BROCHURE // QCTO OCCUPATIONAL QUALIFICATION

Investment *Advisor*

Develop the investment, wealth and portfolio advisory capability your clients trust — and build **the advisor teams that grow and retain assets under advice.**

NQF 6 Occupational Qualification · SAQA ID: 105021 · QCTO accredited · INSETA-administered EISA

NQF 6	12 months	213 credits	5 + EISA
OCCUPATIONAL QUAL	FLEXIBLE ONLINE	ON COMPLETION	MODULES

QCTO

SAQA Registered

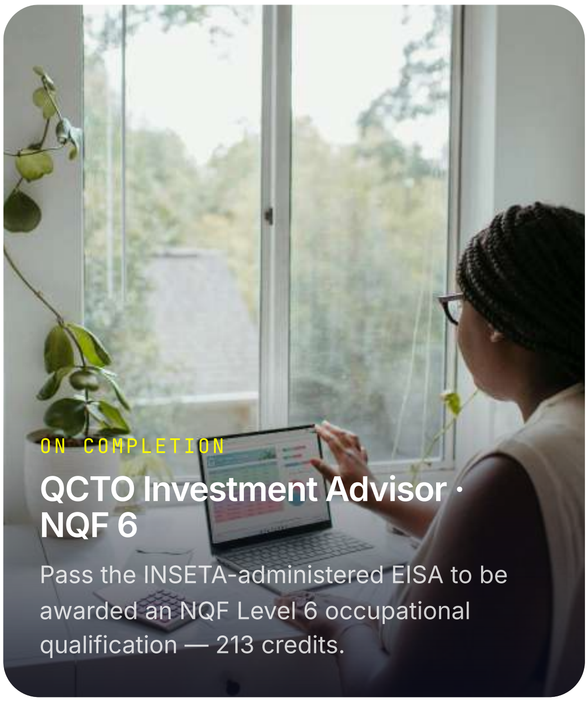
#SHAPEYOURFUTURE

THE OPPORTUNITY

Develop the advisors clients *trust with their future.*

Investment clients want more than product knowledge - they want advisors who understand markets, structure portfolios with intent, and guide them through regulation, tax and risk with confidence.

The Investment Advisor qualification is a QCTO-aligned, NQF Level 6 occupational qualification for organisations developing investment, wealth and client-portfolio advisory capability. It's workplace-integrated and delivered as managed organisational cohorts - so your teams build recognised, externally validated competence while they keep serving clients.



ON COMPLETION

QCTO Investment Advisor · NQF 6

Pass the INSETA-administered EISA to be awarded an NQF Level 6 occupational qualification — 213 credits.

Recognised throughout financial services

An industry-recognised credential, externally assessed by INSETA - giving clients and regulators confidence in your advisors' competence.

WHAT YOUR TEAM GAINS

Capability your advisors *apply from day one.*

Industry-recognised NQF 6

A qualification recognised throughout the financial services industry — 213 credits of professional development.

Investment & portfolio expertise

Investment strategies, portfolio construction and client-advisory skills that make advisors invaluable to clients and employers.

Study while they work

Flexible online study fits around client demands, so teams advance their qualification without leaving the desk.

Taught by market experts

Learn from industry experts with real market experience — not generic academic theory.

Immediate workplace impact

Skills your advisors implement in the workplace immediately — every module is built around real client and portfolio scenarios, so the value shows up in advice quality straight away.

YOUR TEAM'S JOURNEY TO TRUSTED ADVISOR

Five core modules, then the *EISA.*

01 MODULE

The Investment Professional

- Navigate the programme structure and prepare for a successful career as an investment advisor.

02 MODULE

Financial Services: Mapping the Universe

- Master economic principles, industry trends, financial risk and regulatory frameworks.

03 MODULE

Investment Value: Navigating the Terrain

- Navigate markets, retirement planning and investment taxation.

04 MODULE

Destination: Trusted Investment Advisor

- Explore collective investment schemes, offshore options and governance.

05 MODULE

Gear Up: Ace Your Exam

- Develop the techniques to excel in the final assessment.

EISA FINAL EXAM

External Integrated Summative Assessment

- The final INSETA-administered exam to prove expertise and earn the qualification.

HOW DELIVERY WORKS

Workplace-integrated, *built around client work.*

Delivered as a managed organisational cohort on CPSLearn — flexible online learning that fits around client demands, with structured support from enrolment to the EISA.

DELIVERY

CPSLearn® platform

- Personalised pathways with stewardship support and instant feedback, accessible on any device.

DELIVERY

Industry-expert facilitation

- Guided by facilitators with real market experience, using live investment and portfolio scenarios.

DELIVERY

External EISA

- Independent INSETA-administered assessment validates competence and awards the qualification.

ENTRY REQUIREMENTS

An NQF 5 qualification, and current employment in the financial services sector. Ideal for investment advisors, wealth managers and client-portfolio teams developing technical capability.

WHY CHOOSE CPS

Two decades developing financial-services *professionals.*

For over two decades CPS has specialised in workplace-integrated learning for financial services — qualifications applied directly to your teams' real client work, under leader support and guidance.

30,000+
Financial-services professionals developed through CPS programmes.

24+
Years specialising in professional skills development across the sector.

85%+
Completion rate across NQF Level 4–6 programmes.

1 **Deep financial-services specialisation**
Focused on banking, investment, insurance, risk and compliance — every scenario and assessment reflects real industry practice, not generic theory.

2 **Fully accredited, externally validated**
A QCTO occupational qualification (SAQA ID 105021) with an independent INSETA-administered EISA — recognised across the industry.

3 **Workplace-integrated methodology**
Designed to enhance productivity, not disrupt it — teams learn while they work, applying new capability to live client portfolios.

4 **B-BBEE Level 1 partnership**
A Level 1 contributor that aligns your skills-development spend with your transformation objectives.

5 **Managed end-to-end journeys**
From enrolment to certification — learner support, assessment, moderation, funding guidance and progress monitoring throughout.

BRING THIS QUALIFICATION TO YOUR TEAM

Build investment advisors clients *trust.*

PRICING

Enquire · corporate packages

CREDENTIAL

NQF 6 · QCTO · SAQA ID 105021

DURATION

12 months · 213 credits

ASSESSMENT

INSETA-administered EISA

DELIVERED AS A MANAGED JOURNEY

- Five core modules plus structured EISA preparation
- CPSLearn® access & industry-expert facilitation
- Assessment, moderation & learner support
- Funding guidance & ongoing progress monitoring

Talk to our partnerships team

Build investment and wealth advisory capability across your organisation with a managed CPS cohort.

Request a conversation →

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EISA examination fees are not included. Funding assistance may be available, subject to availability. 15% VAT applies to all fees. Pricing valid for 2025.