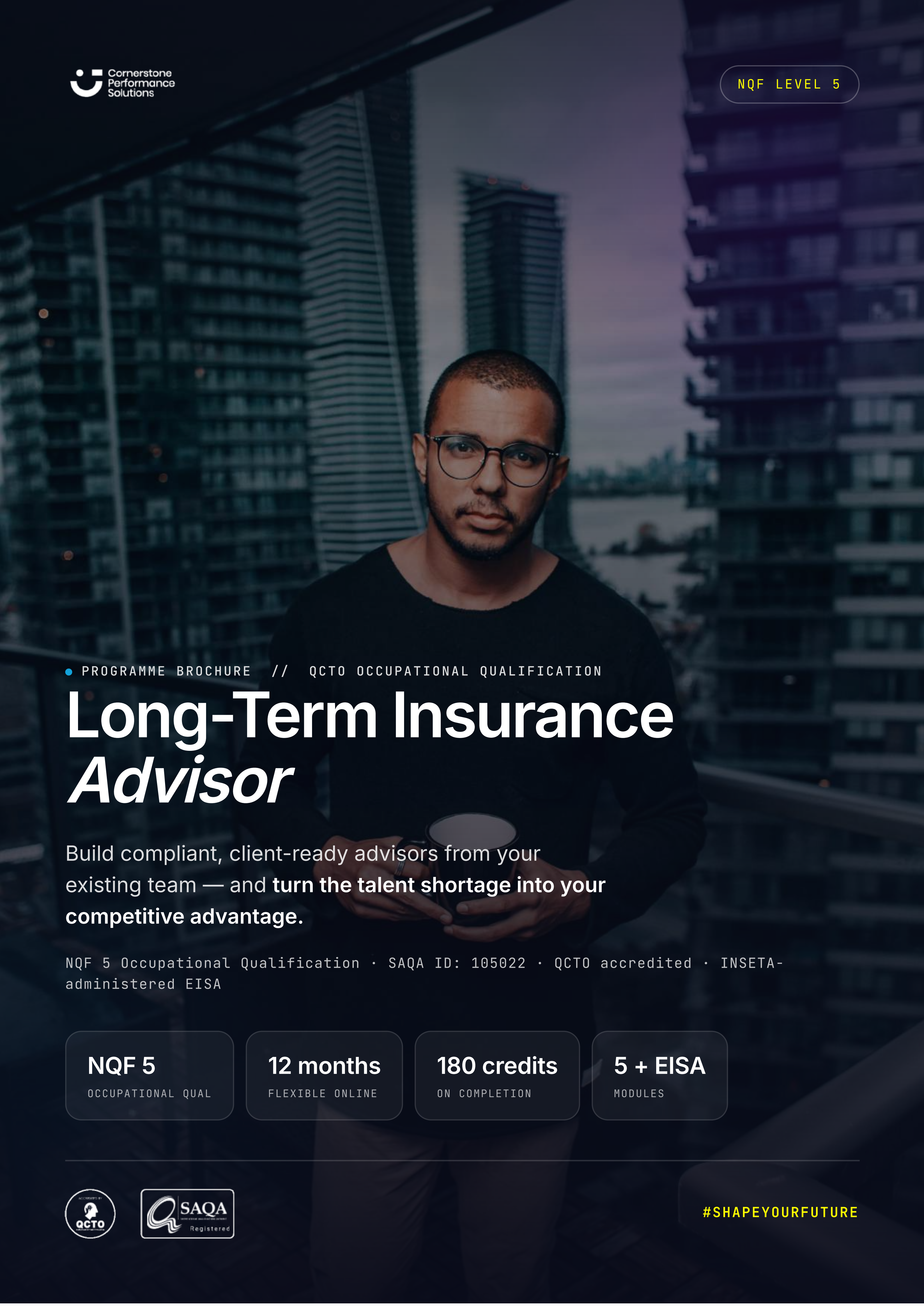

Cornerstone Performance Solutions

NQF LEVEL 5

PROGRAMME BROCHURE // QCTO OCCUPATIONAL QUALIFICATION

# Long-Term Insurance *Advisor*

Build compliant, client-ready advisors from your existing team — and **turn the talent shortage into your competitive advantage.**

NQF 5 Occupational Qualification · SAQA ID: 105022 · QCTO accredited · INSETA-administered EISA

| | | | |
|---|---|---|---|
| **NQF 5** | **12 months** | **180 credits** | **5 + EISA** |
| OCCUPATIONAL QUAL | FLEXIBLE ONLINE | ON COMPLETION | MODULES |

#SHAPEYOURFUTURE

THE SMART TALENT STRATEGY

# Build qualified advisors - *don't hunt for them.*

While competitors struggle with 8-month recruitment cycles for limited talent, leading South African firms have shifted from *buying* qualified advisors to *building* them internally through proven qualification pathways - scaling advisory teams faster and turning the talent shortage into competitive advantage.

The Long-Term Insurance Advisor qualification solves both your compliance requirements and your talent shortage with one strategic investment: stronger cultural alignment, higher retention, a predictable talent pipeline and full FSCA compliance - while avoiding premium external recruitment costs.

PROVEN SUCCESS RATES

**85%+**

completion with structured workplace application of learning - so your "build" investment actually produces qualified advisors.

vs. 67% standard-programme average

BENEFIT 01

### Ensure FSCA compliance

- Meet regulatory requirements by developing internally qualified advisors with recognised NQF 5 credentials - eliminating compliance risk and FSCA penalties.

BENEFIT 02

### Solve your talent shortage

- Build qualified advisors from your existing team rather than competing for scarce external talent in South Africa's constrained skills market.

BENEFIT 03

### Reduce recruitment costs

- Develop internal staff into qualified advisors instead of expensive external recruitment, where qualified advisors command premium salaries.

SKILLS YOUR TEAM DEVELOPS

# The professional foundation advisory careers are *built on.*

### Professional foundation building

The fundamental advisory mindset and professional approach essential for all financial-services roles.

### Client relationship fundamentals

Core skills in client engagement, needs analysis and professional communication that transfer to all advisory specialisations.

### Regulatory & compliance foundation

A solid understanding of FSCA regulations, FAIS requirements, ethics and compliance that underpins all advanced qualifications.

### Business & risk acumen

Foundational business understanding and risk-assessment capability required for investment and comprehensive planning roles.

### Learning & professional development

The learning capabilities and professional identity needed for continuous qualification advancement in South Africa's evolving regulatory environment.

THE LEARNING JOURNEY

# Five core modules, then the *EISA.*

**01**
4 HRS VMS

### The Long-Term Insurance Professional

- Maximise your learning within programme rules and processes while building the professional foundation.

**02**
16 HRS VMS

### Financial Services: Mapping the Universe

- Grasp financial-sector context, principles and the FSCA regulatory environment.

**03**
20 HRS VMS

### Protecting Value: Navigating the Insurance Landscape

- Understand long-term insurance basics, client needs and FAIS compliance requirements.

**04**
16 HRS VMS

### Destination: Trusted Insurance Advisor

- Develop expert advice skills, applying risk-assessment and ethics knowledge aligned with FSCA standards.

**05**
4 HRS VMS

### Gear Up: Ace Your Exam

- Prepare for the external examination to pass with flying colours - the first time.

**EISA**
FINAL EXAM

### External Integrated Summative Assessment

- INSETA-administered qualification ensuring FSCA recognition - with comprehensive CPS preparation support.

**37.5** hrs
Virtual classroom contact across the programme.

**17**
Formative assessments building to the EISA.

**12** mo
Duration, with workplace experience logbook.

THE CPS APPROACH

# Behaviour change, not just *product knowledge.*

Most advisory training fails because it focuses on product knowledge without addressing behaviour change. Our RAMPed™ methodology is built differently - addressing five domains: Results, Action, Mindset, Paradigm and Efficacy.

METHODOLOGY

### RAMPed™ approach

- Develops genuine advisory behaviour across Results, Action, Mindset, Paradigm and Efficacy - not just exam recall.

SUPPORT

### Khanyisa AI companion

- Personalised coaching and content support at scale, guiding advisors as they apply new thinking with real clients.

ON THE JOB

### Workplace mentorship

- A QCTO requirement that CPS supports through Khanyisa - relieving pressure on busy managers while ensuring real application.

ENTRY REQUIREMENTS

An NQF 4 qualification, and current employment in the financial services sector. Ideal for long-term insurance advisors in regulated environments and broker networks developing advisor capability.

CAREER PROGRESSION PATHWAY

# From foundation to *trusted advisor.*

LTIA is the NQF 5 core-professional step that unlocks a full QCTO progression - building senior advisory talent from your internal pipeline rather than expensive external recruitment.

| | | |
|---|---|---|
| **NQF 4**<br>FOUNDATION ENTRY | **Financial Service Consultant · Claims Administrator**<br>12 months → entry-level compliance + basic FAIS readiness. | |
| **NQF 5**<br>CORE PROFESSIONAL | **Long-Term Insurance Advisor**<br>12 months → FSCA Fit & Proper compliance + client-facing readiness. | THIS PROGRAMME |
| **NQF 6**<br>ADVANCED ADVISORY | **Investment Advisor · Financial Advisor**<br>12 months → comprehensive financial planning + enhanced FSCA recognition. | |
| **NQF 7**<br>SPECIALIST ADVISORY | **Specialist Financial Advisor**<br>12 months → advanced specialist advisory capabilities. | |
| **NQF 8**<br>EXPERT & LEADERSHIP | **Financial Planner**<br>Career-long development + premium market positioning. | |

WHY PARTNER WITH CPS

# The proven pathway to building *compliant advisory talent.*

In 24 years operating in the South African market, CPS has helped major financial firms solve talent shortages by starting with solid regulatory foundations - and a systematic approach that ensures FSCA compliance while enabling progression to advanced qualifications.

**30,000+**
Successful graduates developed through CPS programmes.

**96%**
First-time pass rate on regulatory exams.

**85%+**
Completion with structured workplace application.

1 **Deep financial-services specialisation**
Purpose-built for the South African insurance and financial-advisory market - every scenario and assessment reflects real regulatory practice.

2 **Fully accredited & INSETA-aligned**
SAQA registered, CHE, DHET and QCTO accredited, INSETA aligned - externally validated recognition that matters for FSCA compliance.

3 **Award-winning track record**
A 3-year winner of the BANKSETA Skills Development Awards and a two-time Brandon Hall Award winner - recognised for real-world impact.

4 **B-BBEE Level 1 contributor**
57% Black ownership and 32% Black women ownership - skills-development spend that advances your transformation objectives.

SAQA REGISTERED · CHE ACCREDITED · DHET ACCREDITED · QCTO ACCREDITED · INSETA ALIGNED

Cornerstone Performance Solutions

● INVESTMENT & NEXT STEPS

# Solve compliance and talent with *one investment.*

INVESTMENT

**R25,960 per delegate**

CREDENTIAL

**NQF 5 · QCTO · SAQA ID 105022**

DURATION

**12 months · 180 credits**

ASSESSMENT

**INSETA-administered EISA**

WHAT'S INCLUDED

- Programme fees & virtual contact sessions (37.5 hrs)
- Simulation & digital content on CPSLearn®
- Khanyisa AI companion & workplace mentorship support
- Assessment, moderation & INSETA EISA preparation
- SETA funding optimisation - we handle everything

## Build your advisory team

Custom cohorts, group pricing & volume discounts, flexible enrolment timing and dedicated corporate account management.

**Request a conversation →**

ORGANISATIONS
succeed@cps.co.za

GET IN TOUCH
+27 11 789 1957

Pricing is per delegate, excluding 15% VAT, based on a cohort. Additional electives will increase the duration of the course. SETA funding assistance available, subject to availability.