



ASISU

ACADEMY

CONSUMER FINANCIAL
EDUCATION (CFE)
PRACTITIONER
SPRINTS

BROCHURE

December 2022

THE PURPOSE OF THE CFE PRACTITIONER SPRINTS

The CFE Sprints are designed to equip individuals who lead and manage in the CFE area, both within organisations which implement their own CFE programmes as well as CFE delivery partners. The Sprints are delivered online over live 2-hour morning sessions covering a range of topics including Enterprise Development, Mobile CFE, Coaching, Financial Planning and CFE, Global CFE Trends, Regulation, Reporting and the FSC. At the heart of the Sprints is a set of case studies around which the learning will be hinged to ensure the content is relevant to the South African CFE context.

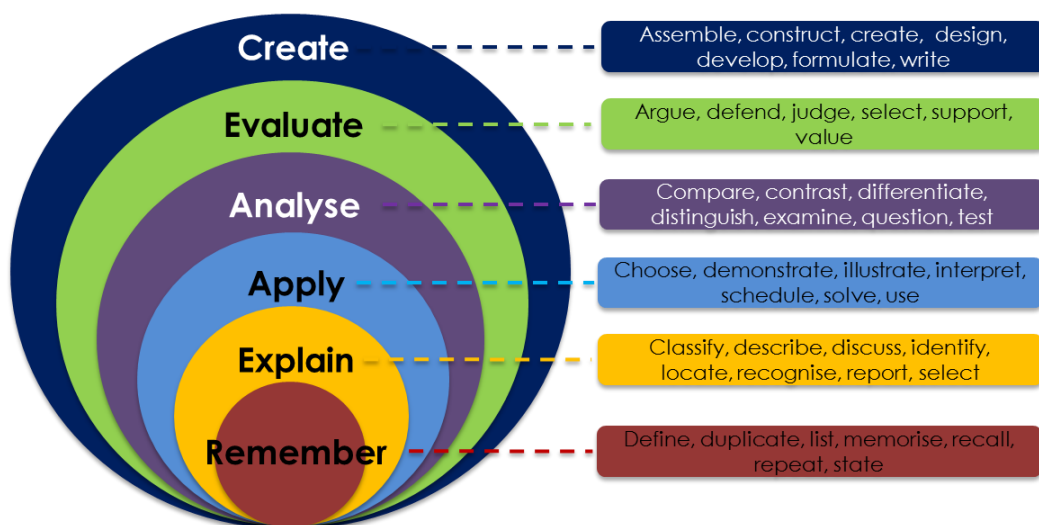
1. ASISA ACADEMY VISION, TRACK RECORD & ACCREDITATION

The ASISA Academy creates and delivers high quality solutions to meet the skills development needs of South African Savings, Life Assurance and Investment Management organisations. The Academy resulted from the need for a fresh approach to developing savings and investment management skills and achieving broader, more rapid transformation of the industry using an approach that responds to industry realities and is delivered by industry experts in an academically sound manner.

More than 14,000 people in the Southern African financial services sector have learned with the ASISA Academy since 2008 with over 1000 industry presenters keeping the learning rooted in reality. The Academy has a **Level 1 B-BBEE rating**. The ASISA Academy creates and delivers high quality solutions to meet the skills development needs of South African Savings, Life Assurance and Investment Management organisations. Our learning solutions are informed by and responsive to industry realities, delivered in an academically sound and practitioner-led manner. The Academy resulted from the need for a fresh approach to developing investment management and life insurance skills and achieving broader, more rapid transformation of the industry.

2. APPROACH TO LEARNING

We work hard at the ASISA Academy to ensure every learning experience is as interactive as possible. To achieve this, we draw on the expertise of some of the most experienced and specialised professionals in the industry and we limit the size of our groups. The following diagram captures the Academy approach to learning. We aim to achieve the bulk of our learning in the biggest circles.





3. DETAILED LEARNING OUTCOMES FOR THE CFE PRACTITIONER SPRINTS

The following pages summarise each topic and the learning outcomes covered in each Sprint.

#	TOPIC	LEARNING OUTCOMES	DURATION
1	Enterprise Development	<ul style="list-style-type: none">• Use appropriate tools for developing a robust and resilient enterprise development programme• Ensure appropriate reporting, monitoring and evaluation• Assess sustainability of enterprises• Partner for sustainable initiatives• Foster sustainable economic growth in rural and peri-urban areas• Engage in case studies for application to current and future initiatives	2 hours
2	Mobile CFE	<ul style="list-style-type: none">• Understand that CFE has the unique requirements in the mobile environment• Identify opportunities created by mobile technology within the CFE environment• Harness the opportunities created by increased mobile penetration to leverage more effective CFE programmes• Understand trends in Fintech as they apply to CFE	2 hours
3	Coaching, financial planning and CFE	<ul style="list-style-type: none">• Understand the relevance of financial coaching and planning within CFE• Differentiate between financial coaching and financial planning in the CFE space• Incorporate relevant elements of financial planning and coaching in CFE	2 hours
4	Global CFE Trends	<ul style="list-style-type: none">• Use appropriate tools for developing a robust and resilient programmes• Benchmark current and future programmes against other global initiatives• Apply global case studies to local experience	2 hours
5	Regulation, Reporting and the FSC	<ul style="list-style-type: none">• Understand how current and proposed regulation affect existing and future CFE programmes• Evaluate current programmes in light of strategic direction of the Financial Sector Conduct Authority• Align with changes in the Financial Sector Charter	2 hours

4. THE PROGRAMME CHAMPION



JOLLY MOKOROSI
B. Comm (Business Management & Economics)
Certified Director IODSA

Jolly has extensive experience in the South African savings and investment sector in particular in the retirement fund space where she serves a number of funds as a professional independent trustee, executive principal officer and chairperson. She has been interviewed on TV and radio regarding CFE, written articles for the financial press and is a highly regarded speaker on the topic at conferences. Her involvement in financial services education spans 2 decades.

5. FEEDBACK FROM PAST DELEGATES

Some comments from past Academy delegates about their experiences on our courses:



- “What an amazing and educational course. I definitely learnt a lot in the past three days and am looking forward to interpreting what I've learnt in my daily work and personal life.”
- “There has been a lot of discussion and interaction between presenters and delegates. This is very positive and adds a lot of value.”

- “The information was relevant, and I also liked the act on consumer education for external providers. It is well articulated in terms of what is required.”
- “I now have a better understanding about CFE. Eager and excited to learn more about it in the next two days of the course, as well as take the knowledge and interpret it in my everyday personal and working life, especially for someone that works in the CFE industry.”



6. CONTACT INFORMATION

For more information, please contact the ASISA Academy on:

- Email: LEARN@asisaacademy.org.za