



ASISA

ACADEMY

## ASISA Academy Newsflash – October 2020

This year has been incredibly challenging for our internships, because introducing graduates to the workplace traditionally requires significant face-to-face interaction in a formal work environment. But despite the trials presented by the Covid-19 social distancing requirements that were implemented just as Katleho Khatlisi started her Independent Financial Advisor (IFA) internship with Serala Wealth Managers in Johannesburg, Katleho has made history by being offered a permanent position just seven months into her 12 month internship.

Behind this incredible success story is an unwavering commitment by both the intern, in this case Katleho, and her host IFA practice, Serala Wealth Managers, to making the internship work. Dimakatso Moloji, administrative manager at Serala Wealth Managers, explains that Katleho made the effort to understand the company's vision right from the beginning when she started her internship in March this year. She adds that from there on Katleho ensured that she delivered in line with Serala's vision: "She is willing to learn, she asks questions and once she is given a brief, she delivers. She is a star."



*From left: Katleho Khatlisi, Dimakatso Moloji*

Katleho attributes her quick progress from intern to paraplanner to this approach: "When you come into a new working environment learn how things are done, learn the company culture, ask questions and be open to more learning."

At the ASISA Academy we could not be prouder of Katleho, whose hard work and eagerness to learn has paid off. She holds a B. Com Honours degree in Financial Planning from the University of Johannesburg and was also one of the first interns this year to obtain her RE5 certificate. The RE5 certificate, together with the experience gained on the ASISA Academy's IFA Internship, provides interns with a strong foundation on which to build should they wish to pursue the board exams that qualify them to become fully-fledged advisors.

The ASISA Academy offers three [internships](#):

- [IFA Internship](#)
- [IMACS@TSiBA Internship](#)
- [I'M Work Ready Internship](#)

We look forward to hosting alumni and current interns from these three internships at our first ever virtual alumni event on Tuesday, 10 November. The aim is to celebrate the success of our alumni and to inspire and motivate the current interns to achieve great things. Facilitating the event will be Thandekile Moloko, ASISA Academy Investment Management Work Ready alumnus and founder of SimWealth. Thandekile will be sharing her career journey alongside other alumni such as Kgomotso Makena, articulated financial planner at Netto Invest, Yustashia Naidoo, report writer at Alexander Forbes, Pebetso Mabona, ESG research analyst at Legae Securities, Sibusiso Mkhali, transaction advisory associate at Ernst & Young and Nokuthula Siswana, retail operations consultant at Allan Gray.

### **Occupational Certificate: Financial Markets Practitioner**

We are pleased to announce that the ASISA Academy is preparing to deliver the newly re-registered NQF level 7 Financial Markets Practitioner Occupational Certificate ([ID number 117238](#)) in 2021.

The good news for ASISA members is that this qualification is offered as a learnership, which complies with the criteria in categories B and D on the Learning Programme Matrix for scoring skills development points as set out by the Financial Sector Code (FSC).

We are planning to roll out the qualification in May next year. The learning programme is open to anyone with either an NQF Level 6 qualification in finance or a related field of study or an NQF level 6 qualification plus three years of relevant assessed work experience in the financial markets and will consist of three components: knowledge, practical skills and workplace experience. More information will be made available early next year. Please sign-up [here](#) if you would like to be kept informed.

## Courses presented in October

- We presented two online workshops for the Office of the Auditor-General. The topic was "Local and International Bonds". This is the second inhouse workshop presented to staff of the Office of the Auditor-General this year.
- The second virtual [Consumer Financial Education \(CFE\) Practitioner Blitzcamp](#) was presented on the mornings of 8, 15 and 22 October 2020.
- Two [Investment Sprints](#) were delivered in October on the topics of "Fundamentals of pricing and unitisation" and "Investment performance overview". To date, 177 delegates have attended our Sprint sessions, introduced shortly after the Covid-19 lockdown regulations were implemented earlier this year.
- We also delivered two bespoke IFA Sprints for Edge Growth, the fund manager of the ASISA Enterprise and Supplier Development (ESD) initiative on the topics of "Investing in an IFA practice" and "IFA Business Overview".

In October we engaged with trustees from the Geoscience Pension and Provident Fund on the topic of "Death Benefits" as part of our [Retirement Fund Trustee Education \(RFTE\)](#) programme.

This is what the delegates had to say about the courses:

- *"I really enjoyed the session and the time spent on each topic was enough to understand everything."*
- *"All presenters and topics were excellent! Thank you!"*
- *"It was all exceptionally professional and useful and highly recommended!"*
- *"Very good presentations, a lot of information shared which was very refreshing and looking forward to the next session."*

## Examination time

Our thoughts are with the delegates who attended the ASISA Academy powered UCT Life Insurance [Claims Assessors' Short Course](#) over the past four months and who are currently preparing for their final examination later this month. May your hard work pay off and may you achieve the results that you have worked for.

The 2020/21 [IMACS@TSIBA](#) students have also been hard at work preparing for their year-end exams. These students, who are all sponsored by ASISA members, are working towards their third and final year of their Bachelor of Business Administration Degree with TSIBA Education. We look forward to seeing them return in 2021 for the second half of their Investment Management Administration course with us.

## Upcoming courses

The [Investment Sprints](#) below still have some space. To enrol, please click [here](#):

- 20 November: Investment management fees and costs in the context of retirement funds
- 8 December: Investment management business overview
- 10 December: Fundamentals of other asset classes

## In closing

We invite you to [contact us](#) to discuss how we can support your learning requirements. As always, we also welcome suggestions and proposals.

Please visit our new [website](#) for more information and like our [Facebook page](#) for regular updates. We also invite you to interact with us on [LinkedIn](#).

Best wishes

Alicia Davids

ASISA Academy CEO