



ASISA Academy Newsflash – July 2021

The highlight for July was seeing the interns on the ASISA Academy [Independent Financial Advisor \(IFA\) Internship](#) showcasing what they have learnt in the first few months at their host practices. The 35 graduates are interning with 28 host practices in Bloemfontein, Cape Town, Durban, East London, Gqeberha and Johannesburg.

The interns were required to prepare and deliver online presentations to their managers and ASISA Academy mentors on their learnings and experiences thus far. This exercise hones the presentation skills of these young, budding professionals and teaches them to convey messages in a structured and organised way - an invaluable skill for when they take on client facing roles as financial advisors.

We also requested feedback from the host practices and would like to share the response received from Gary Walker at Olemera Financial Services. This is the third year that Olemera is hosting an intern. The previous interns from 2019 and 2020 have remained with the practice and have become permanent employees.

"Cherozaan is doing really well. Each and every month I find her growing together with Nadia and Asanda. They are learning to understand more about how the practice should be run, could be run, or could be improved. I really look forward to the value they could bring in the future."



From left: Gary Walker (Managing Director), Nadia Pillay and Asanda Makhaba (IFA interns from 2019 and 2020, retained by Olemera Financial Services as full-time employees), Cherozaan Jefftha (2021 IFA intern)

IFA practices interested in hosting interns in 2022 are invited to submit their applications during the sign-up window period. The application window will open at 08h00 on Friday, 6 August 2021, and closes at 17h00 on Tuesday, 31 August 2021. Insights from the IFA Internship programme champions can be found [here](#).

IMACS@TSiBA Internship

We look forward to receiving our eleventh cohort of TSiBA Education students on 13 August. These second year Bachelor in Business Administration (BBA) students will be doing the [IMACS@TSiBA Internship](#) over the next 12 months while completing their BBA degrees. They have the wonderful privilege of being sponsored by ASISA members. Those who successfully complete all their courses will go on to intern at their sponsors.

We would like to acknowledge the sponsors of this internship who remain dedicated to helping these young people, many of whom are the first in their families to graduate from a university. Not only are they creating employment opportunities for young talent, but they are also pro-actively transforming our industry one intern at a time. A big thank you goes to Allan Gray, Coronation, Futuregrowth, Prescient, Prudential, Sanlam and Taquanta.

Work readiness at the University of KwaZulu-Natal

At the request of the University of KwaZulu-Natal's School of Accounting, Economics & Finance, the ASISA Academy presented an online work readiness course over three mornings to undergraduate and postgraduate students. The course material focused on preparing students for the workplace by teaching skills such as writing a CV, preparing for and handling a job interview, goal setting, team work and diversity in the workplace. In addition, the course also focused on mental health and wellbeing, dealing with failure and building resilience. This is the third year running that the ASISA Academy has been requested to present the course.

ABSIP Sprints

The ASISA Academy presented another [Investment Sprint](#) to student members of the Association of Black Securities and Investment Professionals (ABSIP). This brings to four the number of Sprints sponsored by Aeon Investment Management and presented by the ASISA Academy to ABSIP student members over June and July. The following topics were covered:

- The investments governance landscape
- Fundamentals of equities portfolio management
- Responsible investing
- Investment management ethics



Some of the ABSIP students attending the ASISA Academy Investment Sprints in June & July pictured above with Academy presenter, Anton Berkovitz and Course Coordinator, Nqabisa Mbana, top left

Welcome to the team, Marweyah Williams

We would like to extend a warm welcome to Marweyah Williams, who takes on the role of Academic Manager from 2 August 2021. She will be responsible for quality control across the ASISA Academy's academic programmes as well as monitoring, evaluation, and accreditation of the various programmes.

Marweyah is an experienced Occupationally Directed Learning Practitioner with more than 20 years' experience in various industries including banking, insurance and education. She is a registered assessor and moderator and is therefore well-versed with the standards of quality assurance required by bodies such as the Quality Council for Trades and Occupations (QCTO). Marweyah is passionate about seeing people develop through learning and believes that by encouraging a growth mindset, one inspires lifelong learning.



Marweyah Williams, the new ASISA Academy Academic Manager

The following courses were presented in July

The [UCT Life Insurance Claims Assessors' Short Course](#) kicked off on 14 July with a group of 14 delegates from South Africa as well as neighbouring countries.

The following [Retirement Fund Trustee Education \(RFTE\)](#) workshops were presented to a total of 154 delegates:

- Protection of personal Information Act (POPIA)
- Trustee Governance and Ethics
- Investment Management Fees & Costs
- Responsible Investing
- Death Benefits

Upcoming courses

1. Investment Sprints

Our live online 2-hour [Sprint](#) workshops are hosted by a team of expert presenters. The following Investment Sprints are still able to accommodate delegates:

- Fundamentals of other asset classes - 25 August 2021
- Fundamentals of equities portfolio management - 2 September 2021
- Investment management business overview - 14 September 2021
- Fundamentals of pricing and unitisation - 23 September 2021
- Investment performance overview - 30 September 2021

2. Consumer Financial Education (CFE) Practitioner Blitzcamps

The [Consumer Financial Education \(CFE\) Practitioner Blitzcamps](#) are delivered online by experienced programme champion, Jolly Mkorosi. Each of the following four Blitzcamps is designed to equip individuals who lead and manage in the area of CFE:

- Introduction to CFE - 10 September 2021
- Engaging Stakeholders - 30 September 2021
- Digital CFE - 7 October 2021
- Behavioural Economics - 14 October 2021

3. RFTE public workshops

The following CPD points-bearing [RFTE](#) workshops are available on a fully-funded basis to South African trustees and principal officers.

- Responsible Investing - 19 August 2021
- Trustee Governance & Ethics - 23 August 2021

- Investment Fundamentals - 26 August 2021
- Annual Financial Statement Analysis - 10 September 2021
- Trustee Governance & Ethics - 13 September 2021
- Investment Policy Statement Analysis - 17 September 2021

In memoriam

We received the most devastating news in the last week of July that Eva Kekana, a member of the ASISA Academy Board, had passed away suddenly. Her passing leaves a deep void and we will miss her wisdom and her passion for uplifting young adults by providing them with learning opportunities.

Last year in August we commemorated Women's Day and Women's Month by dedicating the ASISA Academy Newsflash to the women on our team. We had asked each of them to share with us some inspirational insights, which we published in that edition.

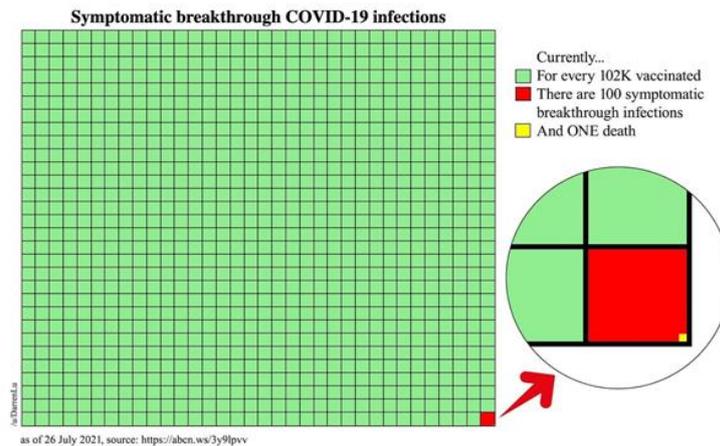
We would like to honour Eva by recalling the life lesson she had shared with us in that edition aimed at encouraging women to aim higher:

The world owes me nothing. In fact, I owe it to the world to make a positive impact. As the Chinese proverb states: "Do for Self".



Help end the pandemic – choose vaccination

I recently received my first dose of the Pfizer vaccination and felt a huge sense of relief knowing that I had taken the first step towards protecting my loved ones and those who are vulnerable from Covid-19. Once I am fully vaccinated I am not only protecting myself against serious illness as a result of a Covid-19 infection, but I am also significantly reducing the risk of infecting others. I would like to urge all of you to do the same. The registration process is easy and can be completed [here](#).



Learn with us in 2021

The ASISA Academy is recognised as a Level 1 B-BBEE contributor, with more than 75% of the Academy's beneficiaries being black South Africans. This means that employers can claim 135% of their skills development spend with the ASISA Academy. Please feel free to [contact us](#) to discuss how we can support your skills development requirements for 2021.

Please visit our [website](#) for more information on our many learning opportunities 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