



ASISA Academy Newsflash – June 2021

June was a good news month for the ASISA Academy! Not only did the number of delegates trained by the Academy since its inception, pass the 10 000 mark, but the Quality Council for Trades and Occupations (QCTO) also approved our application for an extension of scope, enabling us to introduce our very first learnership. The [Financial Markets Practitioner Learnership](#) is based on the revised Occupational Certificate: Financial Markets Practitioner (NQF ID 117238), which is the first NQF Level 7 occupational qualification and learnership specifically designed for the investment management industry.

Relevant for employers is that this qualification complies with the Financial Sector Code (FSC) criteria set out in categories B and D on the Skills Development Learning Programme Matrix for scoring skills development points.

The Financial Markets Practitioner Learnership 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 financial markets and will consist of three components: knowledge, practical skills and workplace experience. A Level 6 qualification equates to a Diploma or Advanced Certificate, while a Level 7 qualification is on par with a Bachelor's Degree or an Advanced Diploma.

We are in the process of compiling a database of qualifying black graduates who are currently unemployed and who could benefit from this learnership. Please contact [Mazana Mngonyana](#) for more information.

The Financial Markets Practitioner Learnership is open for enrolments. Please [click here to enrol now](#) or email learn@asisaacademy.org.za for more information.

Retirement Fund Trustee Education

In June we managed to break all previous monthly attendance records with more than 200 delegates attending 13 [Retirement Fund Trustee Education \(RFTE\)](#) workshops. The Academy has now trained in excess of 700 RFTE delegates since January this year.

A new RFTE workshop also made its debut in June. The [RFTE Private Equity](#) workshop was presented for the first time on 29 June 2021 as a public workshop. We are grateful to Tanya van Lil, CEO of the Southern African Venture Capital & Private Equity Association (SAVCA), and Shelley Lotz, SAVCA Head of Regulatory Affairs, for presenting this workshop.

Our workshops are fully-funded for South African trustees and principal officers through our partnership with the ASISA Foundation. The ASISA Academy is a Batseta Approved CPD Provider, which means that participation in a workshop enables delegates who are Batseta members, to earn CPD points.

Welcome to the team, Giselle Gould

Giselle Gould joins the ASISA Academy as programme champion for the [Retirement Fund Trustee Education \(RFTE\) Programme](#) from 1 July 2021. A respected member of our industry with more than 25 years of experience, Giselle is a seasoned professional in the retirement funds industry. She holds a BSc and is a commercial member of the SARS Tax Court.

Giselle takes over the reins from David Morris who has nurtured our RFTE Programme over the past nine years. Lucky for us, however, we are not losing David completely as he will continue to present on our workshops. ASISA Academy would like to extend a warm welcome to Giselle, as well as thank David for his commitment and dedication to his role as RFTE Programme Champion since 2012.



From the left: David Morris and Giselle Gould, the former and current RFTE Programme Champions respectively

A little heart to heart

As a team we like to keep tabs on our alumni, because following their progress and watching them grow as young professionals motivates us to keep doing better in our efforts to create opportunities for young people interested in pursuing a career in financial services.

This is how we recently came across a [blog](#) post by Katileho Khatlisi, who participated in the 2020 ASISA Academy [Independent Financial Advisor \(IFA\) Internship](#). Apart from the fact that it is written so well, the blog caught our attention because of the honest reflections on what a young professional grapples with when mapping out a career path.

I would like to encourage all current interns and alumni reading this Newsflash to look at Katileho's blog and to share this within your respective networks. You are welcome to share your own journey with us and your advice for other young professionals on the challenging path of building careers. If we get enough responses, we may even publish some excerpts. Please share via email with [Mazana Mngonyana](#).



Katileho Khatlisi participating in a pre-COVID group activity at the ASISA Academy IFA Internship in 2020

ABSIP Sprints

The ASISA Academy presented three [Investment Sprints](#) to student members of the Association of Black Securities and Investment Professionals (ABSIP). The Sprints were sponsored by Aeon Investment Management and our presenters kindly agreed to present the two-hour online Sprints in the evenings to accommodate the students' learning schedules. A fourth Sprint, also sponsored by Aeon, will be presented in July. The following Sprints were attended by 74 delegates in June:

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



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

Upcoming courses

- Our popular [UCT Life Insurance Claims Assessors Short Course](#) will start on 14 July 2021 and will be delivered online as a series of 17 full-day online sessions. This course is recognised by the Insurance Institute of South Africa (IISA) for CPD points, which can be claimed by delegates who successfully complete the course. We still have a few spaces available – [click here](#) to enrol.
- The next [Shariah Investing Blitzcamp](#), scheduled for 5 August 2021, will provide delegates with an overview of Shariah investing, its origins, how to implement and administer Shariah compliant investments and the relevant governance considerations. [Click here](#) to enrol.
- The August dates for the [UCT Collective Investment Schemes \(CIS\) Short Course](#) and the [UCT Investment Management Administration & Client Servicing \(IMACS\) Short Course](#) have been confirmed. Please click on the relevant links to enrol.

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