NQF Level 4 | INSETA

Long Term Insurance Advisor

Specialize in long term insurance advisory services including life insurance, investment analysis, and client relationship management. This qualification prepares you for professional advisory roles in the long term insurance sector.

180	28	NQF 4
Credits	Months	Level

Qualification Overview

This Long Term Insurance Advisor qualification provides specialised training in life insurance, investment advisory services, and client relationship management. The program combines investment advisory principles with practical skills needed to provide professional long term insurance advice and solutions.

Learning Outcomes

Upon completion of this qualification, learners will be able to:

- Understand the investment advisory industry and its role in life insurance
- Apply principles of providing professional advisory services
- Analyse and evaluate investment opportunities for long term insurance
- Facilitate and implement investment decisions for clients
- Build and maintain professional client relationships

- Provide specialised advice on life insurance products and services

Core Modules

Module 1: Investment Advisory Industry

Comprehensive overview of the investment advisory industry, its structure, regulations, and role in long term insurance services.

Module 2: Professional Advisory Services

Regulatory requirements and principles for advising clients on insurance, savings, retirement planning, and investment strategies.

Module 3: Investment Analysis & Evaluation

Analyzing client needs for long-term wealth creation and protection, and evaluating available investment options.

Module 4: Implementation & Wealth Creation

Recommending and implementing appropriate wealth creation and protection solutions for clients.

Module 5: Client Relationship Management

Building and maintaining professional relationships with clients in the long term insurance sector.

Module 6: Life Insurance Products

Specialized knowledge of life insurance products, services, and their application in wealth management.

Technical Skills Development

Advisory & Client Management

- Professional client consultation and needs analysis
- Building long-term client relationships
- Compliance with regulatory requirements

Investment & Wealth Management

- Analysis of investment opportunities

- Long-term wealth creation strategies
- Portfolio management and protection planning

Life Insurance Specialization

- Life insurance products and applications
- Retirement fund planning and advice
- Medical aid and benefits consultation

Qualification Details

SETA	**INSETA**
NQF Level	**Level 5**
Credits	**180 Credits**
Duration	**28 Months**
SAQA ID	**105022**

Career Opportunities

- Financial Advisors (entry-level)
- Personal Financial Planners
- Financial Services Call Centre Agents
- Client Service Providers
- Insurance Intermediaries
- Brokers and Broker Consultants
- Retirement Fund Consultants
- Retirement Fund Administrators

- Trust Fund Officers
- Product Developers

Need Help?

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help@speccon.co.za

Related Qualifications

Explore other INSETA qualifications

NQF Level 6
Financial Advisor

NQF Level 5
Insurance Underwriter

NQF Level 4
Claims Administrator

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