



# ASISA ACADEMY BLITZCAMPS

# 1. ASISA ACADEMY VISION & CONTEXT

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 has been accredited as a learning provider by the BANKSETA since 2008.

The Academy resulted from the need for a fresh approach to developing investment management skills and achieving broader, more rapid transformation of the industry. The intention is take candidates' learning beyond that of their tertiary studies using an approach that responds to industry realities and is delivered by industry experts in an academically sound manner.

The Academy operates at three levels:

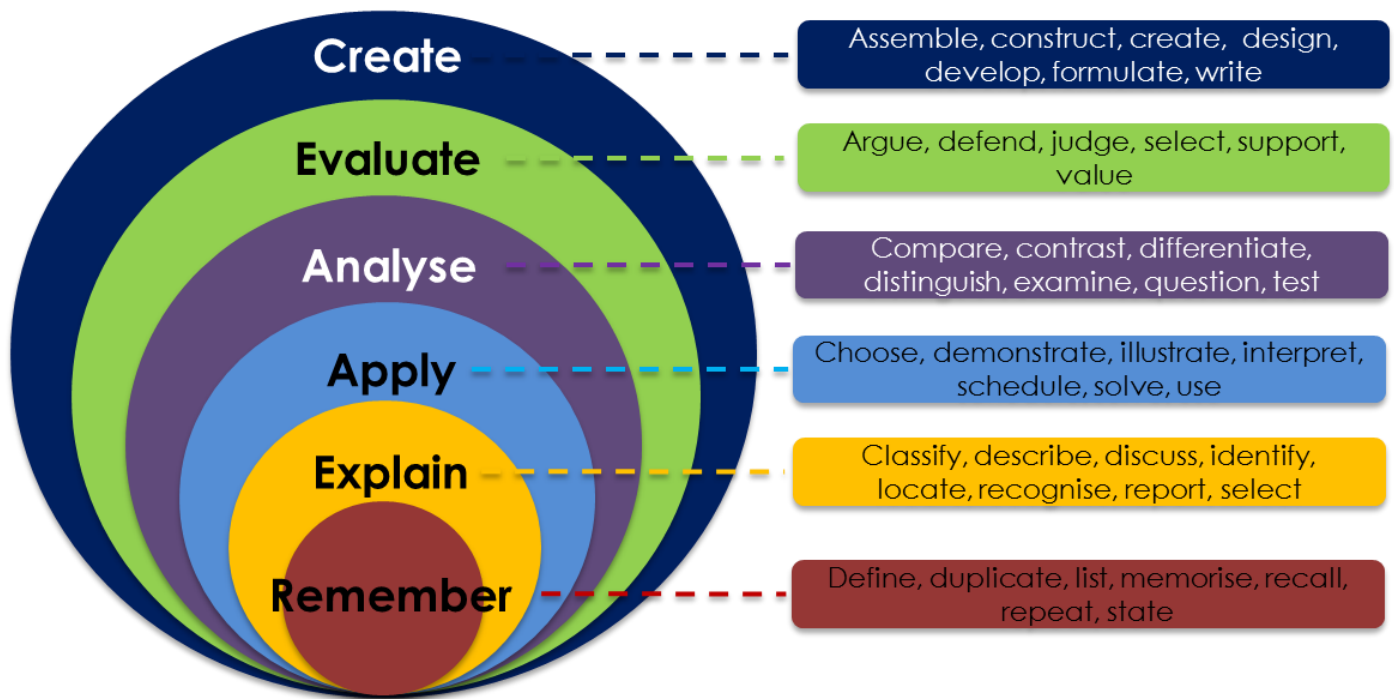
1. With those employed in the industry and their stakeholders to ensure that the skills base within our industry allows us to compete with the best in the world.
2. With young people entering or considering a career in the industry to bridge the gap between the theories learned at university and the realities of the work environment so that students can become work-ready while still studying.
3. With existing and potential consumers as well as retirement fund trustees to raise the levels of their financial literacy.

More than 5000 people in the Southern African financial services sector have learned with the ASISA Academy since 2008, with over 450 industry presenters involved. Programmes that have been successfully implemented include Investment Management Professional Induction (IMPI) programme, Equity Analysts' Bootcamps, Investment Management Administration & Client Servicing (IMACS) course, Collective Investment Schemes (CIS) course, Ethics Workshops for Investment Managers & Retirement Fund Trustees, CFA Level One Exam Readiness Workshops, Long term Insurance Underwriter course, Claims Assessor course, FAIS Regulatory Exam Readiness Workshops and our first university Partner in Learning, TSiBA Education. We have also introduced Blitzcamps such as Derivatives, Compliance Monitoring & Reporting, Financial Services Industry Overview and Life Insurance Business Overview.

## 2. APPROACH TO LEARNING

Every learning session takes the form of an interactive workshop interspersed with engaging tasks or other learning activities. The programme will draw deeply on the expertise of some of the most experienced professionals in the industry.

The diagram below captures the Academy approach to learning. We aim to achieve the bulk of our learning at the top levels of the circles.



The Blitzcamps class sizes are limited to fourteen per course which allows for a very supportive learning environment in which no committed delegate gets left behind. An online learning environment is used where all the presenter resources can be accessed from anywhere at any time.

### 3. WHAT IS EACH BLITZCAMP ABOUT?

#### INDUSTRY OVERVIEW BLITZCAMPS

##### Financial Services Industry Overview

An introduction to the financial services industry painting the big picture of how the industry fits together, describing the main role players, showing the flow of funds through the industry as well as the typical products offered by the various businesses.

An additional one-on-one Industry Overview is available for newly-appointed Senior Executives with little or no investment or insurance industry experience. The intention is to provide a safe, independent space for a new executive or company board member to get to grips rapidly with the nuances of the industry. The overview will be facilitated by a highly experienced practitioner with prior experience at the highest levels in the industry.

##### Investment Management Business Overview

An introduction to the investment business industry providing a broad overview of how an investment management business is structured and the workflow through the firm. This Blitzcamp builds on the foundational learning from the Financial Services Industry Overview Blitzcamp showing candidates how investment research, portfolio management, dealing, administration, governance and technology fit together at an investment management firm. It also considers how the firm interacts with other industry players such as stockbrokers, the JSE & STRATE and outsourced service providers.

##### Life Insurance Business Overview

An introduction to the life insurance industry providing a broad overview of how a life office is structured and the concepts underpinning it. Topics include life office products, types of risk, valuation and surplus, the difference between guaranteed and market-linked business and the policyholder/shareholder split.

#### SPECIALIST BLITZCAMPS

##### Derivatives 101

This Blitzcamp will provide participants with a working knowledge of derivatives. It is not aimed at specialists who will trade derivatives but rather those people who encounter them on a daily basis and need to know the use and impact of derivatives on their work. Topics include overviews of how equity and interest-bearing derivatives work and common trading strategies, legislation covering derivatives and derivative risk areas.

##### Compliance Monitoring and Reporting

This Blitzcamp will provide delegates with an understanding of compliance monitoring and reporting as required by Cisca and Regulation 28 of the Pension Fund Act. The sessions will explore system limitations, the requirements of the FSB, SARB and ASISA. Delegates will be empowered immediately add value to their organisations and the industry.

The Blitzcamps have proved to be successful, and demand has grown substantially. The Academy runs programmes in Cape Town and Johannesburg depending on demand.

## 4. FEEDBACK FROM PAST CANDIDATES

Some comments from Academy candidates about their experience on the programme...

- “Today’s session meant that I could consolidate everything that I had learnt over the days of the course. It has been very valuable. I am very excited about the knowledge I have gained. Great course!”
- “This is much more (content wise and experience)



than I expected. The enthusiasm of the lecturing/organising team is infectious.”

- “Great lecturers from the industry that has a wealth of knowledge to share. Thoroughly enjoyed it!”
- “In a nutshell, the investment industry summed up in a week and getting top industry professionals to simplify complexity in our working environment was

one of the most fulfilling things in my career, and am ready to apply all the concepts learned, from Excel to self-management and through to compliance to add value and simplify my life, most of all and those that I work with, and continue to question status quo”.

- “It’s a great course and should really be given a lot more attention to new comers to the industry”.
- “What an educational and enjoyable week! I’ve learned a



lot and can’t wait for the next week to begin! Everything is run well from the time set aside for presentations to the contents of presentations”.

- “I think, for me anyway, that a huge part of the value of the course lies in the contacts made through the course – with leaders in the industry as well as colleagues grappling with the same issues.”
- “I relished in the fact that we were being addressed by experts within the CIS industry. Thanks!”

- “Great course, thank you for this wonderful opportunity! Can’t wait for next course”.
  - “The presenters were all extremely well prepared. It was fantastic to get the insights from all of the experienced individuals!”
- The course was highly beneficial to me as a newbie in this industry. I would recommend that everyone that’s unfamiliar with the big picture of the investment world do the course. Really great experience.”

## 5. CONTACT INFORMATION

For more information please contact the Academy via:

Email: [info@asisaacademy.org.za](mailto:info@asisaacademy.org.za)

Web: [www.asisaacademy.org.za](http://www.asisaacademy.org.za)

Landline: +27 21 673 1627