

June 2024



— Investing for a world of change

# Assistants' Masterclass

## About this course

This course will help you enhance your capabilities and proficiency in using and understanding Ninety One's investment products and processes.

By participating in this series, you will develop valuable skills and knowledge that will benefit you and your clients.

Here's what you can expect:

- Six interactive sessions hosted via Zoom, where you will have the opportunity to submit any questions.
- Modules designed to equip you with all of the tips and tricks you need to excel as an advisor assistant.
- Virtual assessments to test your knowledge and application of the Ninety One products and processes.
- Ninety One certificate of completion will be awarded to assistants who pass each assessment.

## Why attend?

Enhance your knowledge and skills

Improve your clients' experience

Optimise efficiencies through the Ninety One web

Reduce errors and rejections

## Masterclass completion

You will need to achieve a minimum score of 80% to pass each module. Once you have passed all the modules, you will receive a certificate of completion to showcase your achievement.

If you score 91% or higher, you will be recognised as a Ninety One Superstar!

## Need to chat

If you have any questions or require additional support, please contact us on [masterclass@ninetyone.com](mailto:masterclass@ninetyone.com) or contact your Sales Manager.

## Course outline

### Investing 101

Thursday, 4 April 2024

This module covers the fundamentals of investing, with an introduction to unit trusts and an overview of collective investment schemes.

In addition, Paul will also address some general investment and economic insights.

**Paul Hutchinson**  
Sales Manager



### Legal and tax matters

Thursday, 18 April 2024

Explore tax implications for investment platform products at retirement and death, including income tax, capital gains tax, and estate duty.

Through real-life examples, learn how the two-pot system will apply to different investment platform products.

**Salome Young**  
Legal Counsel



### Compliance and estates

Thursday, 2 May 2024

This module covers Anti-Money Laundering (AML) & Countering Financing of Terrorism (CFT) requirements and the rationale for specific documents for compliance. We will also address estate late processes, timelines, and service-level agreements.

**Stephan Kemp**  
Head of Compliance  
and  
**Noelene Pillay**  
Estate Late team Leader



### Cyber security

Thursday, 16 May 2024

This module provides essential tips for recognising fraudulent activities and safeguarding yourself and your clients against cyber-attacks.

**Samantha Rule**  
Head of Information Security,  
Cyber & IT Risk



### Offshore and what I would tell my sisters

Thursday, 30 May 2024

Explore the basics of offshore investing: essential procedures, necessary documentation, and expected timelines. Then, referencing his three sisters, Albert offers insights and guidance for navigating the complexities of the investment landscape.

**Albert Coetzee**  
Head of Global  
Investment Platform



### The web: past, present, future & top tips

Thursday, 13 June 2024

Join us on a journey through Ninety One's transactional site evolution, exploring current offerings and future enhancements. This session will cover top tips, the upcoming family office offering, planned enhancements, and a comparison of web versus manual process efficiency.

**Mark Hounsell**  
Regional Sales Manager  
and  
**Leonie Schoeman**  
Business Analyst

