

AI and the Advice Profession: Governance, Ethics and Practice for South African Financial Advisers

A practical, self-paced online course that helps advisers use AI with confidence, sound judgement and a clear understanding of what regulators expect.

WHY THIS MATTERS NOW

In their first industry-wide study of AI in financial services, the FSCA and Prudential Authority found that insufficient skills and governance, not technology, are the single biggest barrier to responsible AI adoption. Data privacy, bias and explainability were flagged as the top risks.

Under FAIS, advisers who use AI to support advice remain responsible for oversight, monitoring and outcomes. Advisers who understand the governance and ethics of AI now will be the ones clients and regulators trust with it.

01

Governance

The regulatory landscape shaping AI in advice, including FAIS oversight duties, POPIA and Treating Customers Fairly.

02

Ethics

A defensible framework for responsible AI use that protects client trust and guards against bias, inaccuracy and over-reliance.

03

Practice

Applying AI with confidence in day-to-day advice work, and knowing where human judgement must always lead.

Who it is for: financial advisers, planners and practice managers who want practical clarity on using AI responsibly, and a credible answer when a client or compliance officer asks how AI is governed in their practice.

FORMAT

Online, self-paced

ACCESS

12 months from enrolment

ON COMPLETION

Certificate and 5 CPD points

INVESTMENT

R1,500 per delegate (excl. VAT)

CPD points: the certificate carries 5 CPD points, issued directly to learners by the Financial Planning Institute (FPI) on completion.



1 TO 9 LEARNERS

R1,500

Standard price

10 TO 19 LEARNERS

R1,350

Save 10%

20 TO 29 LEARNERS

R1,200

Save 20%

30 OR MORE LEARNERS

R1,050

Save 30%

Training a team? Group rates are per learner (excl. VAT) on a single order, invoiced together. For 50 or more learners, contact us for a quote. Send us your learner list and we will handle enrolment for you.

ENROL TODAY

AI and the Advice Profession

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