



FINANCE AND TREASURY TRAINING

Insurance Broking and Intermediary Practice

3 day course

Classroom, online or in-house

Course overview

A broker is engaged by the client and paid by the insurer, and every difficult moment in the role traces back to that arrangement. This course addresses it directly. Delegates work through the broker's duty of care and the advice standard they are held to, including where a failure to advise becomes negligence. Client risk assessment follows, establishing what actually needs insuring rather than renewing what was bought before. Market placement is covered, including approaching insurers, presenting a risk properly and the disclosure the broker must pass on. Quotation comparison beyond premium is addressed, covering wording differences that only matter at claim. Remuneration, commission disclosure and conflicts are treated honestly. Claims advocacy on behalf of a client is covered. Documentation, records and the file that defends the broker follows. Regulatory obligations including licensing and client money handling are addressed. The course closes on renewal discipline and on retaining clients without underinsuring them.

What you will learn

- Apply the broker's duty of care and advice standard
- Assess client risk rather than renewing what was bought before
- Present a risk to the market with full disclosure
- Compare quotations on wording as well as premium
- Disclose remuneration and manage conflicts of interest
- Advocate for a client through a claim
- Maintain records, handle client money and meet licensing obligations

Who should attend

- Insurance brokers and account executives
- Intermediary principals and compliance officers
- Corporate insurance buyers working with brokers
- Claims staff at broking firms
- New entrants to insurance intermediation

Course outline

- 01 Engaged by one party, paid by another
- 02 Duty of care and the advice standard
- 03 Client risk assessment
- 04 Presenting a risk to the market
- 05 Disclosure obligations
- 06 Comparing wordings, not just premiums
- 07 Remuneration, commission and conflicts
- 08 Claims advocacy, records, client money and licensing

Upcoming dates



Dates	Venue	Format	Fee per delegate
23 to 25 September 2026	Port Louis, Mauritius	Classroom	USD 995
7 to 9 December 2026	Casablanca, Morocco	Classroom	USD 995
21 to 23 December 2026	Maputo, Mozambique	Classroom	USD 995
4 to 6 January 2027	Accra, Ghana	Classroom	USD 995

Fees and how to register

This 3 day course is **R6,500** per delegate online, **R14,950** in the classroom in South Africa, Botswana, Namibia, Lesotho and Eswatini, and **USD 995** in the classroom elsewhere in Africa. In-house training is quotation on request. Book 2 or more delegates on this course and save 10%.

To register or request an in-house proposal, visit www.afrisciencegroup.com, email info@afriScience.co.za, or WhatsApp us on **+27 63 479 1136**.

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