

Atleha-edu

Speaking life into investment decisions

Education workshop offerings

In Sesotho, when you tell someone to “Atleha” you are telling them to prosper.

We do this by offering quality investment and savings education - helping ordinary South Africans save and invest for a better tomorrow.

Atleha-edu is a non-profit company focusing on financial education, with a specific focus on retirement fund trustees, members and youth. Our workshops are delivered by expert facilitators, aligned to national efforts to improve financial literacy and access to financial services as envisaged by the Financial Sector Conduct Authority (FSCA) and Financial Sector Code.

Workshops, available in-person or online are eligible for Batseta CPD accreditation. We manage all planning, hospitality, course content, workshop materials and logistics on your behalf. Atleha-edu is able to offer quality financial education to South African trustees, union shop stewards and youth at no cost given our funding partnerships.

Topics cover the following themes, or can be tailored based on participant surveys to ensure relevance and impact:



Two-Pot Retirement System

The Two-Pot Retirement System is aimed at improving retirement outcomes by balancing access to funds and long-term savings. Atleha-edu explores the rationale, its structure, and key components, including tax implications, offering insights into retirement planning reforms for better financial security.



Death Benefits

Section 37C ensures that death benefits bypass the deceased's estate to support their dependants and prioritise their financial security over the member's testamentary wishes. Atleha-edu explores the legal framework of a death benefit distribution, the prioritisation of dependants and the board of trustees' discretion in allocation beyond the deceased's expressed wishes.





Managing Personal Finances

This content empowers individuals to make informed financial decisions, avoid common mistakes, and secure their economic future. Atleha-edu equips participants with essential financial and practical steps to improve financial well-being, covering budgeting, debt management, savings, investments, and financial protection strategies.



Investment Fundamentals

This workshop aims to enhance retirement outcomes by ensuring members receive optimal value from their savings and achieve financial security in retirement. It equips trustees with the knowledge and tools about asset classes, investment risk, inflation etc. to drive value for members in line with National Treasury objectives.



Retirement Fund Governance Fundamentals

This programme equips retirement fund trustees, principal officers and shop stewards with the knowledge and ethical grounding needed to govern retirement funds responsibly. It covers the South African legal and regulatory framework, trustee duties, ethical decision-making, responsible investment, and member rights - ensuring participants can serve fund members with integrity, competence and accountability.

All Atleha-edu's educational initiatives are aligned to a formal Theory of Change and Monitoring Evaluation and Learning (ME&L) programme. An external provider reviews our ME&L programme on an annual basis. Please refer to our [website](#), which serves as an open source platform for educational content, for more financial education offerings.

Funders and strategic partners

Atleha-edu NPC receives FSC Consumer Financial Education funding from a number of industry partners and funders. We are most grateful to the [ASISA Foundation](#), [ASISA Academy](#), [Alternative Prosperity Foundation](#) and [BATSETA Council of Retirement Funds for South Africa](#) for their strategic partnership and funding and implementation support. A full list of our funders is available [here](#).



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Contact us for more info about Atleha-edu NPC or CFE funding opportunities

EMAIL: info@atleha-edu.org | PHONE: 021 851 0091 |

