

**MOONSTONE**  
BUSINESS SCHOOL OF EXCELLENCE

# **Class of Business Overview**

February 2018



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# Why Class of Business Training?

The new Fit and proper requirements as stipulated in the Board Notice 194 of 2017 (effective as from 1 April 2018) announced changes to qualification, RE and experience requirements as well as some of the admin requirements.

*(NOTE: Grandfather clause and exceptions – clients to consult their compliance officer to check requirements)*

- Aligns with bigger initiative of Moonstone to provide monitoring and management of competency registers for clients.
- Moonstone will therefore offer a one-stop solution for competence and CPD requirements, including Class of Business, and a Recognition of Prior Learning service in terms of qualifications.

## Who should attend?

- All FSPs, Key Individuals and Representatives appointed after 1 April 2018.
- FSPs, Key Individuals and Representatives who seek authorisation, approval or appointment for new financial product categories after 1 April 2018.
- Representatives working under supervision as at 1 April 2018, or appointed under supervision after 1 April 2018.

*Note: There are exemptions – prospective students to seek advice from their Compliance Officer.*

# What do we offer?

## COB Standard

- **Pure e-learning option:**
- Online distance learning (e-learning) with access to user-friendly training material and video content
- Regular self-assessment to monitor your progress

## COB Online Facilitated

- **Facilitated e-learning option:**
- Online distance learning (e-learning) with access to user-friendly training material and video content
- Access to online course facilitator and online group discussions
- Regular self-assessment to monitor your progress

## COB Classroom Facilitated

- **Classroom facilitated option:**
- Classroom training can be arranged for corporate groups of 10 or more learners, upon request
- Done over two to three days (depending on the specific Class of Business)
- Also get access to MyMBSE (COB Standard)

## COB Comprehensive

- **Facilitated e-learning option with bridging course towards a qualification:**
- Online distance learning (e-learning) with access to user-friendly training material and video content
- Access to online course facilitator and online group discussions
- Regular self-assessment to monitor your progress
- Complete a bridging course and required assessments to gain the necessary credits/exemptions towards a relevant qualification

# Moonstone Class of Business Modules

1. Short-term Insurance: Personal lines

2. Short-term Insurance: Commercial lines

3. Long-term Insurance

4. Pension Fund Benefits

5. Short- and Long-term Deposits

6. Structured Deposits

7. Investments

8. Forex Investments

9. Health Services Benefits

# Contact persons – queries and more information



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