



THE
LEARNING
DEVELOPMENT
GROUP

Introduction

The Skills Programme, Finance: An Introduction is Unit Standard aligned. It is aimed at individuals in any non-financial job role who need to manage their personal finances by understanding basic financial concepts and principles.

The programme covers the core activities that relate directly to overseeing one's own personal finances, planning and preparing a budget and operating a personal bank account.

Delegates will gain theoretical and practical knowledge of basic accounting terminology, source documents, subsidiary journals and their preparation and posting in a general ledger and preparing final income statements and balance sheets.

Target Audience

The Skills Programme is aimed at those wishing to understand personal finances and basic accounting practices, to manage their income and expenditure more effectively.

It is suitable for any individual in any type of organisation or business sector.

Entry Requirements

- Communication at ABET level 3.
- Mathematical Literacy at ABET level 3.

Additional Requirements

- Access to workplace activities.
- Access to a workplace mentor.
- Access to a PC, software and the internet where online learning is required.

Finance & Accounting

Finance: An Introduction

SERVICES SETA Statement of Results

SP ID:	SP SIY040-1/19
NQF Level:	1
Credits:	12

Course Delivery & Assessment

We use a blend of inclass and virtual interactive learning, workplace learning, coaching and mentoring, theoretical assessment, practical workplace observation and self-study to embed skills.

You will need to:

- Attend all sessions.
- Complete practical workplace experiential learning and assignments.
- Demonstrate theoretical and practical understanding of programme content.
- Compile and submit a Portfolio of Evidence (PoE).

To receive your Statement of Results, Finance: An Introduction, you will need to compile, submit and be found competent on a Portfolio of Evidence (PoE).

Learning Outcomes

By the end of the programme, you will be able to:

- Understand personal finances and concepts of income, earnings, expenditure, tax, inflation, saving and financial planning.
- Plan and prepare a personal budget.
- Operate a personal bank account.
- Explain the cycle of recording transactions and terminology including assets, liabilities, equity, income, expenditure, receipts, payments and profits.
- Explain and demonstrate an understanding of source documents including receipts, invoices, and petty cash vouchers.
- Explain the purpose of each subsidiary journal.
- Prepare subsidiary journals.
- Post subsidiary journals to the general ledger.
- Prepare final Income Statements and Balance Sheets.





Course Content

Finance: An Introduction

Accreditation Body: SERVICES SETA

| Programme ID: SP SIY040-1/19

| NQF Level: 1 | Credits: 12



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US 243189:

Manage Personal Finances

- Understand personal finance
- Plan and prepare a personal budget
- Operate a personal bank account

US 13999:

Demonstrate an understanding of basic accounting practices

- Explain the cycle of recording transactions and relevant terminology
- Explain and demonstrate an understanding of source documents
- Explain the purpose of each subsidiary journal
- Prepare subsidiary journals
- Post subsidiary journals to the general ledger
- Prepare the final statements

Our Accredited Organisations



FACULTY
TRAINING
INSTITUTE



Siyangoba



Siyaya®
SKILLS INSTITUTE



PROSERV
SOUTH AFRICA



MBAT

DEVELOP - EMPOWER - GROW

