

This should include:

- Investment training
  - General financial and investment concepts
  - Financial markets
  - Time value of money
  - Budget principles
  - The banks, interest rates and the SA Reserve Bank
  - Equity markets
  - Other asset classes
  - Retirement funds, including tax consequences
  - The economy in general
  - The functions of asset managers, wealth managers and portfolio managers.
  
- Trustee training
  - Types of trusts and their mechanisms
  - Duties of trustees
  - Rights of beneficiaries
  - Benefits of a trust
  - Control issues in trusts
  - How to manage trust assets
  - Taxation principles in trusts
  - The trust tax return and financial statements
  - Trust deed clauses
  - Trustee meetings
  - The future of trusts in SA.
  
- Entities and legal structures
  - Understanding the different entities, their advantages and disadvantages, their suitability for different ventures, and their tax rates and tax consequences.
  
- Managing and perpetuating the family legacy
  - Understanding the story behind the family wealth
  - Adding the next generation's own perspective to the story
  - Adopting the family vision, mission and goals in managing the family wealth.