



Training Questionnaire

In line with rule 12.2 of the Short-term Insurance Policy Holder Protection Rules 2001, promulgated in terms of the Short-term Insurance Act 53, of 1998, the aim of this questionnaire is to determine the training procedures used by *the intermediary*. The aim is to assess if the intermediary's training and knowledge transfer plans are sufficient for the purposes of accreditation.

The information required below is in respect of the intermediary company and not the individual completing the form on its behalf or any other specific person.

Name of Intermediary: _____

Number of years in insurance: _____

A. Details of general training programmes:

1. Do you have any formal in-house training programme? If yes, please provide details.

Yes	No
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2. Do you have any informal training programme, e.g. mentorship / transfer of knowledge programmes? If yes, please provide details.

Yes	No
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3. Do you make use of outsourced training programmes? If yes, please provide details.

Yes	No
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4. How often does training take place?

5. Do you use any other means of conveying knowledge and keeping employees up to date – e.g. newsletters, internet, communiqué, etc.? If yes, how often are these mediums utilised?

Yes	No
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B. Training on (UMA) Products:

1. Have you received sufficient information from (UMA) on their products?

Yes	No
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2. Do you understand the workings of (UMA) products?

Yes	No
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3. Will new employees be provided with relevant training/information on (UMA) products?

Yes	No
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4. Do you have any specialists employed in the lines of our product/s? If yes, please provide details.

Yes	No
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5. What is the company procedure for handling technical queries or complaints from clients?

6. Do you need (UMA) to provide any further training / assistance in understanding our products and specifications? If yes, please provide details.

Yes	No
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C. PPR obligations:

1. Do you have a clear understanding of your duties as specified in the Short Term Insurance Policyholder Protection Rules?

Yes	No
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2. Does your company see itself as being PPR compliant?

Yes	No
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3. Do you need (UMA) to give you any further training with regard to PPR issues? If yes, please provide details of the aspects you would like covered.

Yes	No
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D. Accreditation

1. Will you be able to individually accredit all employees who are deemed to be competent and proficient in marketing or varying (UMA) products?

Yes	No
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2. Will only accredited people market or vary any (UMA) products?

Yes	No
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3. Will you be able to keep an ongoing register of all such people accredited by you?

Yes	No
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4. Will you be able to provide such register to (UMA) on at least a quarterly basis?

Yes	No
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If you answered No to any of the above questions, please provide details:

Signature

Date

Place