

**APPLICATION FOR RECOGNITION OF PRIOR LEARNING FOR  
THE OCCUPATIONAL CERTIFICATE:**

**SELECT QUALIFICATION (PLEASE MARK WITH A CROSS (X))**

SAQA QUAL ID 93602 <b>Principal Professional Executive Officer</b>		
SAQA QUAL ID 99574 <b>Principal Professional Executive Officer: Retirement Fund Trustee</b>	<b>Part</b>	<b>Full</b>

- IMPORTANT:** Applicants are requested to complete the form in **full**
- Write or print in black ink only or complete electronically
  - Mark with x
  - Original certified copies of qualifications and identity document **MUST** be attached to the application form with a Supporting letter from a Registered Fund that the candidate will be mentored by the Principal Officer and may submit the required documentation for this RPL process
  - Late, incomplete and/or incorrect applications will not be considered
  - Send the completed application form to [jabu@batseta.org.za](mailto:jabu@batseta.org.za)

**Recognition of Prior Learning**

It is important to note that there is more than one way to obtain a qualification. Recognition of Prior Learning is particular to persons who have been actively practicing in a field of employment or occupation where a qualification has either not existed or where circumstance has prevented the person from obtaining a qualification, despite them performing the functions of the occupation. The RPL process allows the person to show through a process of activities that they have acquired the knowledge, skills and workplace experience to be certified against the criteria of the qualification or a Professional Designation.

RPL is a formal process measured against a strict set of criteria as set out by the Curriculum and Quality Councils and is formally assessed through a series of submissions and assessment to confirm the acquired knowledge, skills and practical application meets the qualification or designation criteria and can therefore be certified.

Should the person not meet all the criteria for the RPL process, they are referred to a Skills Development Provider to complete the required programme to assist them in their preparation for the qualification exam.

**QCTO Eligibility Criteria**

Eligible candidates for the RPL process for the Principal Officer and Retirement Fund Trustee qualification and/or designation must:

	<b>PRINCIPAL OFFICER</b>	<b>TRUSTEE</b>
1.	be actively involved in Board meetings of a Pension / Provident or similar Fund for a minimum of <b>2 years</b>	be actively involved in Board meetings of a Pension / Provident or similar Fund for a minimum of <b>1 year</b>
2.	be an active Principal Officer, Deputy Principal Officer or Trustee of a Fund	be an active Trustee of a Fund, or affiliated with or have access to a Fund and its Board
3.	have been actively involved, observed or facilitated in a compliance audit of a Fund	have knowledge and understanding of the governance of a Fund
4.	have a minimum of an NQF Level 5 qualification related to financial services or equivalent	have a minimum of an NQF Level 4 qualification related to financial services or equivalent
5.	provide a detailed CV and a letter from a Fund they are involved with granting them permission to submit the required information and documentation for the RPL process with their application form	provide a detailed CV and a letter from a Fund they are involved with granting them permission to submit the required information and documentation for the RPL process with their application form
6.	confirm their mentor for their workplace experience for the RPL process. Such mentor should be a registered Principal Officer.	confirm their mentor for their workplace experience for the RPL process.
7.	submit the proof of payment of the Registration Fee with the application forms.	submit the proof of payment of the Registration Fee with the application forms.

**Terms and Conditions**

1. All submission requirements must be submitted by the required due dates to be eligible to write the final exam.
2. All required fees must be paid with proof of payments submitted within the required timeframes.
3. All information provided must be verifiable, complete and truthful.

## RPL Process

Application documents will be processed once all is received.

Upon acceptance, you will receive an acceptance letter and an invoice for the programme fee. Once we have confirmed payment, we will invite you to all the required meetings and provide the delivery dates and system login details.

Upon successful completion of the programme as confirmed by the moderation process, and proof of payment of the exam fee, you will be issued with a Statement of Results which allows you access to the final examination.

### 1. PERSONAL PARTICULARS

Batseta Member	Yes		No		If yes member number													
Title																		
Surname																		
Full names																		
Identity number or passport number															Date of Birth	Date	Month	Year
Race	African		Coloured		Indian		White		Gender		M	F						
Are you a South African citizen?											Yes	No						
If <b>NO</b> , what is your nationality?																		
Do you have a work valid Permit?											Yes	No						
If you have permanent residence status, please indicate the date you acquired permanent residence											Date	Month	Year					
Are you a person with a disability?											Yes	No						
If yes, please provide further details																		
<hr/> <hr/>																		
Residential address							Postal address											
Code							Code											
Telephone no							e-mail											
Work																		
Cell																		

### 2. DETAILS OF PRESENT POSITION (if applicable)

Employer			
Position		Period of employment	

3. RELEVANT **PRINCIPAL OFFICER/TRUSTEE** OCCUPATIONAL EXPERIENCE

Years of relevant retirement fund industry Experience		Month			
Employer/fund name	Position/ duties/ type of work	From		To	
		Year	Month	Year	Month

4. SCHOOL EDUCATION

Highest standard/grade passed	Month	Year	Institution

5. POST SCHOOL EDUCATION *(Completed)*

Degree/diploma/certificate	Institution	Year first enrolled	Normal duration	Major subjects

6. MOTIVATION FOR INCLUSION ON THE RPL PROGRAMME **(COMPULSORY)**

Furnish any additional information which you regard as relevant in support of your application

7. FEES FOR RPL

\*All Fees are VAT inclusive

Non Refundable Registration Fee (Payable with the submission of this application form)	PPEO R1 024.00	Trustee R 769.00	PQ Trustee R 769.00
Programme Fee (Payable before receiving the material and access to study)	R7 680.00	R5 952.00	R2 687.00
Examination Fee (Payable before writing the exam)	R6 400.00	R5 777.00	Exam 1 R3 200.00 Exam 2 R3 520.00
Re-Registration Fee (Payable with application to re-register)	R1 024.00	R 960.00	R 960.00
Supplementary Exam Fee (Payable before access letter is granted to the exam)	R1 535.00	R1 535.00	R1 535.00 per exam

**Payment to:** Batseta Council for Retirement Funds of Southern Africa  
Banking details: Standard Bank Acc no 420949844, Sandton Branch 019205

**DECLARATION BY APPLICANT**

I, ..... hereby declare that the information I have provided on this form is correct and give consent that references maybe contacted and credentials verified.

I accept the terms and conditions stated herein and commit that I will adhere to the prescribed programme requirements.

Date: \_\_\_\_\_ Signature: \_\_\_\_\_

**POPI Declaration**

Batseta herewith state that the personal information provided in this application is used for the sole purpose of academic records related to this qualification and the required regulatory reporting due therewith.  
Batseta will not supply any personal information to anyone outside of the stipulated purpose above. By signing this document, you provide your consent and acceptance hereof.