



LIFE INSURANCE UNDERWRITERS' SPRINTS

AUGUST 2025

1. ASISA ACADEMY VISION, TRACK RECORD & ACCREDITATION

The ASISA Academy creates and delivers high quality solutions to meet the skills development needs of South African Savings, Life Assurance and Investment Management organisations. The Academy was established in response to the need for a fresh approach to developing savings and investment management skills and achieving broader, more rapid transformation of the industry using an approach that responds to industry realities and is delivered by industry experts in an academically sound manner.

More than 23,000 people in the Southern African financial services sector have learned with the ASISA Academy since 2008 with over 1000 industry presenters keeping the learning rooted in reality. The Academy has a **Level 1 B-BBEE rating**. The ASISA Academy creates and delivers high quality solutions to meet the skills development needs of South African Savings, Life Assurance and Investment Management organisations. Our learning solutions are informed by and responsive to industry realities, delivered in an academically sound and practitioner-led manner.

2. THE PURPOSE OF THE LIFE INSURANCE UNDERWRITERS' SPRINT

This Sprint is ideally suited for individuals interested in underwriting, new advisors/ brokers who want to understand more about the way risk is underwritten, as well as admin staff who support underwriters.

3. TOPIC AND LEARNING OUTCOMES

The session is planned to run for a total of four hours, taking place from 08:30 to 12:30. It will be hosted virtually via Microsoft Teams, allowing participants to join remotely from their preferred location.

SPRINT TOPIC	LEARNING AREA	LEARNING OUTCOMES
Introduction to Underwriting	What is insurance?	<ol style="list-style-type: none"> 1. List the basic principles on which Insurance is based. 2. Describe the origins of insurance. 3. Describe the concept of risk. 4. Provide a list of reasons for insurance being purchased. 5. Show how the insurance process quantifies risk. 6. Describe the risk management process within an insurer.
	The role of underwriting in the insurance business	<ol style="list-style-type: none"> 1. Define the purpose of underwriting. 2. Describe the duties of an underwriter. 3. Describe the basic underwriting rating factors: age, gender, education, income, smoking, occupation, avocation 4. Describe the mortality and morbidity conditions that result a) Standard rate and b) Sub-standard rate. 5. Describe how medical conditions and family history impacts risk assessment. 6. Describe how occupational conditions could adversely impact a medical condition. 7. Describe how avocational activities could adversely impact a medical condition. 8. Describe what is financial underwriting.

4. MINIMUM NUMBERS AND SPRINT FEES

Subject to a minimum of 10 participants per Sprint, the fees are R2,770 (excluding VAT) per person per Sprint.

5. OUR PROGRAMME CHAMPION



Alan Meechan

Alan has over three decades of experience in the Financial Services industry. His experience includes having led an Individual Life Claims department, including risk and investment products, working in the international Insurance market, setting up and leading various areas from customer relations, policy servicing, sales team, claims and underwriting teams. Alan has also served as Operations Director Underwriting, Claims & Customer Relations. Currently, he works as an independent consultant. This work includes reviewing organizations current processes and providing training frameworks and process improvement / process automation suggestions. Alan is also a certified financial planner and has a Senior Management Development qualification (NQF 8) from the Gordon Institute of Business Science.

6. REFERENCES

References from companies for whom the ASISA Academy has run various other programmes in the past:

YVETTE KEARNS

Liberty

Senior Claims Specialist

Email yvette.kearns@liberty.co.za

FATIMA ACOOB

Nedbank Insurance

Head: Learning & Development

Email FatimaAc@Nedbank.co.za

7. CONTACT INFORMATION

For more information contact via:

Email: LEARN@asisaacademy.org.za

Website: www.asisaacademy.org.za