

Consumer Financial Education

Impactful & Strategic



The Financial Sector Conduct Authority (FSCA) is prioritising financial education and inclusion. Organisations scored under the Financial Sector Code (FSC) need to spend a percentage of NPAT on Consumer Financial Education (CFE) for B-BBEE purposes. Often this spend is not done strategically from a B-BBEE points perspective. Financial sector players need to communicate with and educate existing and prospective clients about the use of financial services and products.

Our Vision

By aligning ourselves to national efforts to improve financial education and access to financial services as envisaged by the FSCA and FSC we are committed to providing quality, accessible and easy-to-digest financial education. Through partnerships we aim to safeguard the financial well-being of South Africans by increasing financial literacy on a national level.

Client

Providers of financial services looking to adopt a strategic approach to their CFE efforts in order to maximise impact and ensure that their CFE spend for FSC scorecard purposes can be claimed.

Our Approach

Provide FSC-compliant financial education to a targeted audience. We do this around a strategic educational theme/s to support financial services providers in achieve measurable education outcomes, B-BBEE points and CFE-compliant brand positioning. We collaborate with industry experts and funders that have a proven track record in delivering impactful, awareness and interactive financial education to appropriate LSM markets.

Consumer Financial Education:

Interactive			Awareness		
Webinars	Workshops	One-on-one	Animated videos and audio recordings	Infographics	Support infrastructure
Measurement and evaluation			Distribution and reach		
Pre-and-post engagement surveys	Perceived value surveys	Focus groups	Large trustee and member email and SMS database	Interactive workshops and webinars	

Benefits

- Annual B-BBEE assessment of black beneficiaries and other B-BBEE CFE compliance requirements
- Ensuring that CFE spend for FSC scorecard purposes can be claimed
- Reaching targeted beneficiaries in an impactful manner

Deliverables

- Refinement of the proposed CFE strategy with client/partner
- Disbursement of funds to the project partners
- Roll out of the strategy with project partners
- Reporting to client on project progress
- Monitoring compliance and impact

“Creating Impact at Scale”