



# Adapt

Insurance industry  
training brochure

# 2022

[kpmg.co.za](http://kpmg.co.za)





# Foreword

The COVID-19 pandemic has brought the insurance industry monumental challenges. The impacts of this health emergency have expanded into far-reaching economic and societal issues. It seems clear that as we emerge from this period, it will be into a new reality that will look different to what existed before.

KPMG insurance professionals around the world have been reflecting intensively on - and widely discussing with clients - the nature of the upheaval taking place and what this means for insurers.

Insurers are confident in their growth prospects and the local and global economy in general. Many insurers are expecting aggressive growth and are looking to expand their businesses. Concerns about operational matters, like supply chain resilience, cyber security and regulatory matters, have climbed back to the top of their agendas.

A major lesson from the pandemic has been that we all need to work together to solve big problems, and importantly, ESG is front and centre in most business plans.

Insurers recognise that digital lies at the heart of how they create new sources of value and have lagged other sectors in their digitization efforts - but we have reached a watershed moment. It is time for those insurers who did not use the pandemic as an accelerator of their digital plans to do so now; to catch up and re-emerge stronger and better. While this is an opportunity, it's also a risk - the acceleration of digital technologies means that business models that have existed for years can quickly become obsolete and irrelevant. As they digitally connect their systems and share data with partners, insurers need to make sure systems and data - especially customer data - are secure. Cyber security threats limit growth and create boundaries to digital development.

Many insurers coped extremely well with the pandemic, demonstrating tenacious agility as they dealt with their one-in-one hundred year event. Continuing this agility will be key to economic recovery. The contribution of the insurance industry to the stability and financial soundness of the South African economy demonstrates the resilience and agility of the industry to innovate and show up when it matters.

With this in mind, we have produced our 2022 insurance training calendar, which we hope will inspire you to continue to find innovative ways to adapt in times of consistent uncertainty.

While we might not be able to see each other face to face, shake hands, or break bread over breakfast and tea breaks, we look forward to interacting, building relationships and sharing our technical expertise with you through our on-line training platform.

Through the 2022 suite of courses we are offering, we demonstrate our passion for the insurance industry, our commitment to quality industry training and our support to the industry in their journey.

**KPMG Insurance practice team**

# Update for non-executive directors in the insurance industry - March edition

## Date

17 March 2022

## Target audience

Non-executive directors in the insurance industry.

## Course overview and objective

Update on the most recent developments to assist you in your role as a non-executive director in the insurance industry.

## Duration

Half day course

## Investment

This course is complimentary

## Estimated CPD hours

4 hours

### For more information contact:

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# KPMG's insurance practice

We provide audit, advisory and tax services to more than ninety percent of the insurance market.

We operate a specialist insurance audit unit of more than 180 professionals fully supported by tax and IT specialists, actuaries, lawyers and other regulatory professionals. This means that our insurance clients get a team of insurance specialists every time.

The insurance industry is a priority segment for KPMG and we are leaders in this segment. Our broad portfolio of clients gives you the confidence that you are being served by professionals who understand all aspects of your business. Our insurance practice is staffed with:

26 Partners

62 Managers

Over 180 professional staff

## Top of our game in everything we do

Our staff attend more than 10 insurance industry training courses and they present another 15 courses to clients, certified by the IISA (Insurance Institute of South Africa).

Our partners are members of global and local professional committees and industry forums, covering IFRS 17, actuarial pricing and risk management, solvency, IT and tax.

Our local Insurance Regulatory Centre of Excellence maintains close ties with our global centre to ensure that we are always equipped to deal with regulatory issues based on global best practices to give you the best help in applying regulations in your business.

## KPMG Insurance in the rest of the world



KPMG's UK Insurance Regulatory Centre of Excellence is a significant factor in the success of our local Regulatory Centre of Excellence.



KPMG's global insurance practice has more than 6,200 professionals in member firms worldwide.

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# Introductory SAM QRT training

## Date

24 March 2022

## Target audience

Financial directors and managers, actuaries and finance team members who are new to the insurance industry and/or new to the completion of SAM regulatory returns.

## Course overview and objective

Introductory training course dealing with the completion of the annual Solvency Assessment and Management (SAM) quantitative and qualitative reporting templates (QRTs) for non-life and life insurers.

## Duration

Half day course

## Investment

R1,800 per delegate, excluding VAT

## Estimated CPD hours

4 hours

### For more information contact:

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# Sustainability Services

Environmental, social and governance (ESG) matters have taken centre stage as stakeholders look to businesses to play a wider role in tackling social and economic challenges. In turn, companies have sought to respond, recover and enhance their resilience to the evolving environment.

KPMG Sustainability Services enables clients to develop future-fit businesses. We do this through our multidisciplinary team comprising of specialists in environmental management, health and safety, socio-economic development, assurance, and monitoring and evaluation. We also benefit from collaboration across the numerous other KPMG service lines and geographies.

Our services include:

- Sustainability assurance
- ESG risk and materiality analysis
- Impact measurement
- Social services
- Green and social bonds
- South African carbon tax
- Sustainability reporting and Sustainable Development Goals

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**Sustainability Services**

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# Advanced SAM QRT training

## Date

14 April 2022

## Target audience

Financial directors and managers, actuaries and finance team members who are experienced in the insurance industry and/or experienced with the completion and review of SAM regulatory returns.

## Course overview and objective

Advanced training course for experienced individuals dealing with the completion of the annual Solvency Assessment and Management (SAM) quantitative and qualitative reporting templates (QRTs) for non-life and life insurers.

## Duration

Half day course

## Investment

R1,800 per delegate, excluding VAT

## Estimated CPD hours

4 hours

### For more information contact:

**Kashmira Naran**

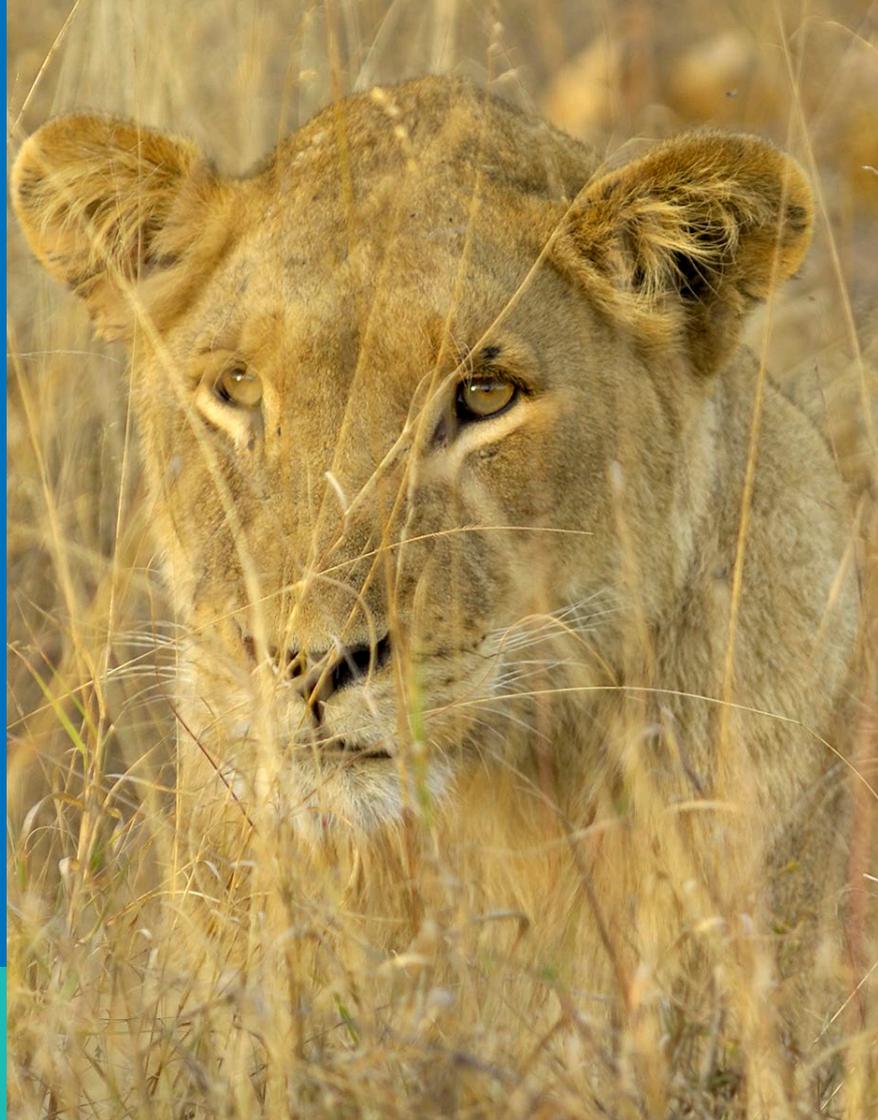
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# Powered Enterprise

With the disruption experienced by businesses as a result of COVID-19, some of the most resilient companies have been those that are the most digitally enabled. The pandemic has accelerated customer adoption of digital channels and this has created an impetus for insurers to undertake digital transformation projects to bring customers more seamless and integrated digital products and services.

Transformative change must be executed with a holistic view, tying together the front, middle and back office and integrating the organisation's capabilities and systems with customer touchpoints.

The KPMG Powered Enterprise solution can help with the digital transformation of your business functions. Our Powered tools and assets are all pre-built enabling you to start your transformation journey with the model answer. The solution is structured around the business target operating model covering all relevant aspects such as people, process, data and performance insights, service delivery model and governance in addition to the technology aspects.

Powered Enterprise is designed to help organisations achieve 'leading practice' and value quickly and securely, so that organisations can drive sustainable change and lower the implementation risk and time taken to implement change.

The solution is available across a variety of cloud technologies and functional areas.

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# Introductory IFRS 17 training

## Date

12 May 2022

## Target audience

Chief financial officers, financial managers, accounting and any other staff members or individuals involved in a financial accounting role who are inexperienced to IFRS 17.

## Course overview and objective

An introductory insurance principles and accounting training course aimed at assisting new entrants to the insurance industry and junior staff in understanding insurance principles and the accounting for insurance transactions in the context of the forthcoming accounting standard, *IFRS 17: Insurance Contracts*.

## Duration

Half day course

## Investment

R1,800 per delegate, excluding VAT

## Estimated CPD hours

4 hours

### For more information contact:

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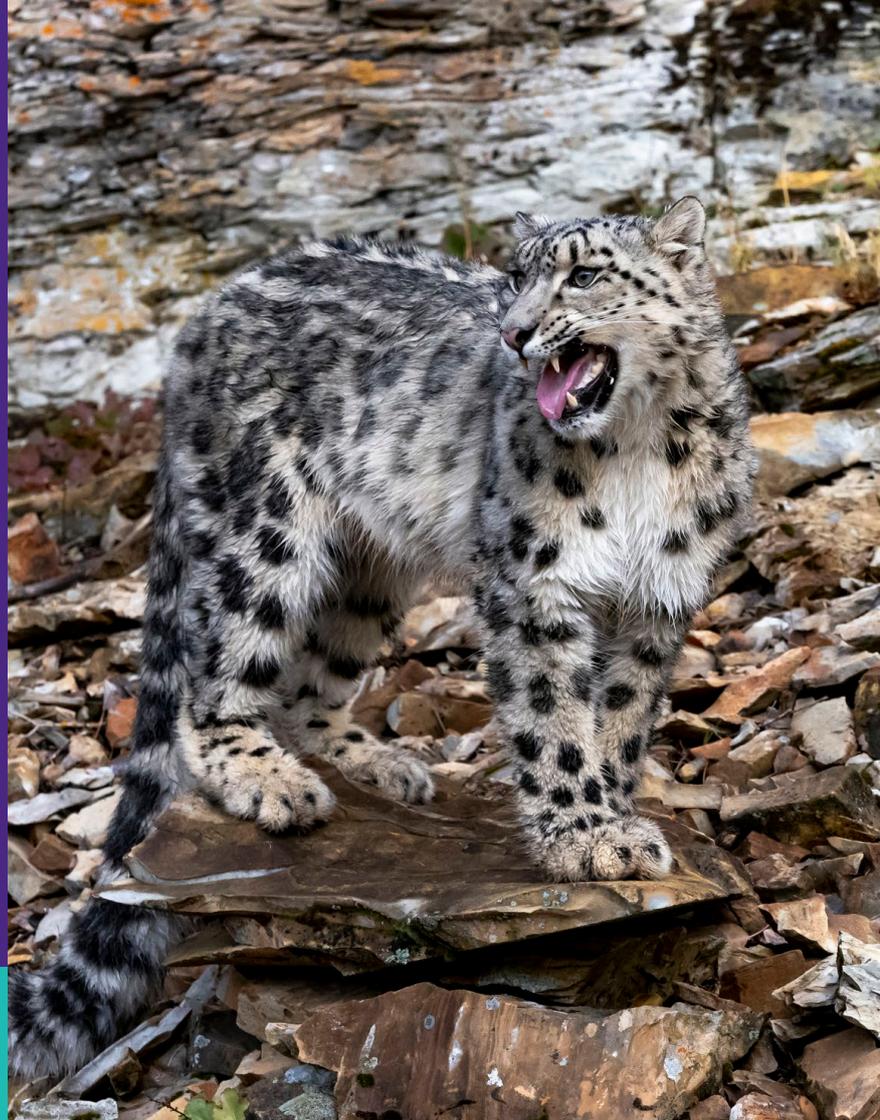
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# Deep dive IFRS 17 training: non-life

## Date

19 May 2022

## Target audience

Chief financial officers, financial managers, accounting and any other staff members or individuals who are experienced in the insurance industry and are part of the organisation's IFRS 17 implementation project.

## Course overview and objective

Training course for experienced individuals dealing with the IFRS 17 implementation project for non-life insurers.

## Duration

Half day course

## Investment

R1,800 per delegate, excluding VAT

## Estimated CPD hours

4 hours

## For more information contact:

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# IFRS 17 outsourced: An end-to-end managed solution for small and medium-sized insurers

*IFRS 17 outsourced using a single, integrated and end-to-end KPMG managed solution – from data quality to reporting*

Challenging times call for automation, digitisation and innovative solutions. What if you could run your entire IFRS 17 process – from data quality to reporting – within one integrated, centrally managed, traceable platform hosted by KPMG and a global IFRS 17 software provider at a fraction of the cost you would incur to do it yourself? What if you could benefit from secure, best-in-class modelling and reporting from a team of actuaries and accountants that can do it all for you, without having to invest in additional finance and actuarial staff, systems and training?

KPMG Managed IFRS 17 Services is designed for our small and medium-sized insurance clients. Let KPMG take you on the finance and risk transformation journey required under IFRS 17.

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# Deep dive IFRS 17 training: life

## Date

9 June 2022

## Target audience

Chief financial officers, financial managers, accounting and any other staff members or individuals who are experienced in the insurance industry and are part of the organisation's IFRS 17 implementation project.

## Course overview and objective

Training course for experienced individuals dealing with the IFRS 17 implementation project for life insurers.

## Duration

Half day course

## Investment

R1,800 per delegate, excluding VAT

## Estimated CPD hours

4 hours

### For more information contact:

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# KPMG Connected Enterprise

**KPMG Connected Enterprise** is a customer-centric, enterprise-wide approach to digital transformation. It is a **framework** designed to connect and align **front, middle and back office functions** to adapt to the dynamic changes and pressures on the insurance industry and organization and it focuses on every process, function, and relationship of a business on meeting **customer expectations**, creating business value and driving sustainable growth in a digital world.

Our solution can help organisations future proof themselves through ambitions that are more **adaptable** and **connected** than ever before. Connected enterprises are better equipped to answer questions such as:

- How do we harness data, advanced analytics and actionable insights with a real-time understanding of the customer and the business, to shape integrated business decisions?
- How do we develop compelling customer value propositions on price, products, and services to engage the most attractive customers and drive profitable growth?
- How do we design seamless, intentional experiences for customers, employees, and partners, supporting the customer value propositions and delivering business objectives?
- How do we interact and transact with customers and prospects across marketing, sales, and service and achieve measurable results?
- How do we operate the business with efficiency and agility to fulfil the customer promise in a consistent and profitable way?
- How do we build a customer-centric organisation and culture that inspires people to deliver on the customer promise and drive up business performance?
- How do we create intelligent and agile services, technologies and platforms, enabling the customer agenda with solutions that are secure, scalable, and cost-effective?
- How do we engage, integrate, and manage third parties to increase speed to market, reduce costs, mitigate risk, and close capability gaps to deliver the customer promise?

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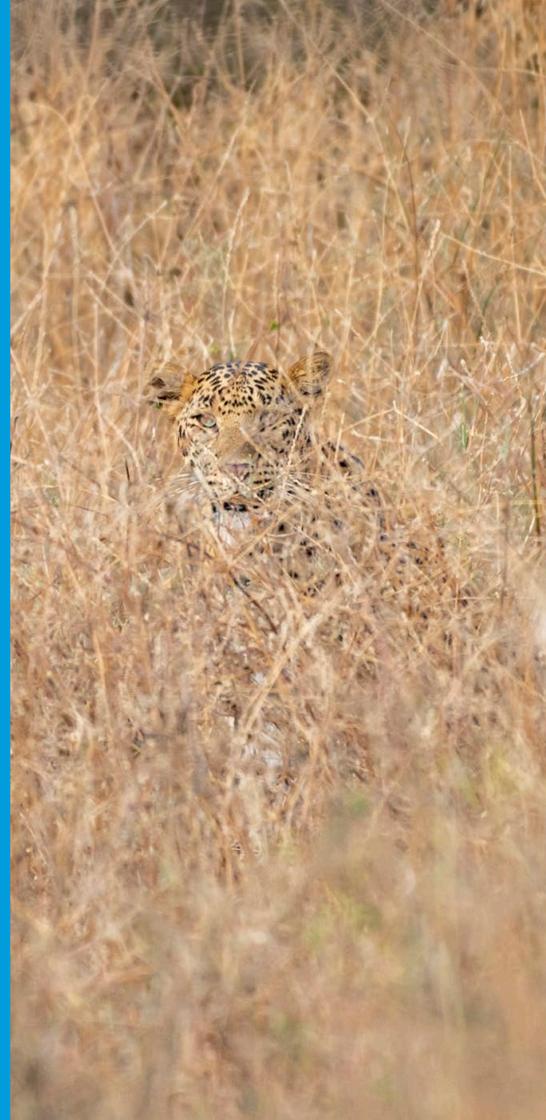
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# Introductory insurance principles and accounting training

## Date

14 July 2022

## Target audience

Accounting and other staff members involved in a financial accounting role who are inexperienced in the insurance industry. The course will also benefit those who would like a refresher on insurance accounting principles.

## Course overview and objective

An introductory insurance principles and accounting training course aimed at assisting new entrants to the insurance industry and junior staff in understanding insurance principles and the accounting for insurance transactions. We will also broadly cover the underwriting, claims and reinsurance processes from initiation to completion. This course will be presented in the context of the currently effective accounting standard, *IFRS 4: Insurance Contracts*.

## Duration

Full day course

## Investment

R2,800 per delegate, excluding VAT

## Estimated CPD hours

7.5 hours

## For more information contact:

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# Insurance industry training

Our tailor-made training courses are designed to meet the specific needs of your organisation – whether it's education on insurance regulations, market conduct, solvency reporting, financial reporting and IFRS 17, to taxation changes, the latest in technology or recent insurance industry developments.

Our training courses can be conducted either at our premises or yours. In addition, our training offering has now been extended to include the option of delivering training in a virtual and no-contact format.

We also offer annual training packages covering our entire suite of training courses, to which your staff are always welcome.

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# Introductory REinsurance principles and accounting training

## Date

21 July 2022

## Target audience

Accounting and other staff members involved in a financial accounting role who are inexperienced in the insurance industry. The course will also benefit those who would like a refresher on reinsurance accounting principles.

## Course overview and objective

An introductory insurance principles and accounting training course aimed at assisting new entrants to the insurance industry and junior staff in understanding reinsurance principles and the accounting for reinsurance transactions. This course will be presented in the context of the currently effective accounting standard, *IFRS 4: Insurance Contracts*.

## Duration

Three-quarter day course

## Investment

R2,100 per delegate, excluding VAT

## Estimated CPD hours

5.5 hours

## For more information contact:

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# Technology and innovation training for insurers

## Date

11 August 2022

## Target audience

Executive and managing directors, financial directors, IT personnel, risk officers, compliance officers and financial managers.

## Course overview and objective

A training course aimed at bringing you up to date on global technology and innovation trends and developments relevant to insurers.

## Duration

Half day course

## Investment

R1,800 per delegate, excluding VAT

## Estimated GPD hours

4 hours

### For more information contact:

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# Insurance is facing a new reality – and we are equipped with the technologies to help you

The COVID-19 health crisis has forced many industries to adapt – the insurance industry is no exception. While some change is needed to meet short-term needs, many aspects of every-day life and business have changed for good. KPMG’s Matchi platform provides a selection of in excess of 6,400 start-up and scale-up technologies to assist insurers with meeting business needs, materialise significant business impact in a short span of time and maintain and build competitive advantage. The platform enables insurers to navigate the universe of insurtechs to solve business problems either by identifying best in class technology providers or developing bespoke solutions.

Examples of benefits from such technologies include:



Reduction in claim assessment costs with an augmented reality motor vehicle assessment tool which uses artificial intelligence to record the visible condition of cars before a claim is reported.



Bringing disparate data sets together with emerging technology to help insurers extract relevant policy information from customer relationship management (CRM) legacy systems and internal data silos – helping insurers understand key trends in the business.



Taking advantage of innovation by adopting a non-clinical diagnostic tool which helps insurers accurately, quickly and non-invasively assess a patient’s health status wherever and whenever it is needed.

**For more information please contact:**

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# IFRS update for insurers

## Date

18 August 2022

## Target audience

Chief financial officers, financial managers and any other staff members or individuals with CPD requirements.

## Course overview and objective

A training course aimed at providing you with a detailed understanding of new financial reporting developments specific to insurance companies, as well as topical application issues found in practice.

## Duration

Half day course

## Investment

R1,800 per delegate, excluding VAT

## Estimated CPD hours

4 hours

### For more information contact:

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# Why did traditional risk management tools and methods miss the global financial crisis, Brexit and COVID-19?

You may find that your current risk management and compliance processes are input heavy and insight light.

The world is changing... indeed pivoting, and so must risk management. The time has come for insurers to rethink risk!

KPMG's unique dynamic risk assessment (DRA) methodology recognises the non-stationary nature of risks and that more is needed to identify and understand their true nature. The methodology adds to and supplements the traditional outputs of quantification of severity and likelihood of discrete risks.

DRA can assist your organisation with the increased needs and expectations from the risk function and supports the board and management in:

- generating a system-wide or network view of your organisation's risks;
- identifying the most expected scenarios for your organisation, including their aggregated severities;
- determining the velocity or speed of impact of risks on your organisation;
- detecting the long-term risk trajectory of your organisation's current strategy and ways of working; and
- identifying the most influential intervention and mitigation points in your organisation's network of risks to reduce its systemic risks at the lowest cost with maximum effect.

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# Annual non-life insurance industry update

## Date

15 September 2022

## Target audience

Financial directors and managers, risk and compliance officers, internal auditors and audit committee and board members.

## Course overview and objective

Your annual update of the most topical regulatory, tax, financial and other developments affecting the non-life insurance industry.

## Duration

Half day course

## Investment

R1,800 per delegate, excluding VAT

## Estimated CPD hours

4 hours

### For more information contact:

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# Privacy advisory services

*Enable and protect*

As organisations seek to improve the customer experience, create value and obtain competitive advantage associated with trust in their brand, the ability to leverage personal information assets in the right way is crucial.

Creating value from personal information, whilst still ensuring legal and operational compliance may be increasingly challenging – we can help you overcome these challenges with our wide range of service offerings:

- **Privacy audits, assessments and advice:** Identify areas of risk associated with privacy compliance and areas where your organisation may be misinterpreting privacy requirements and/or not leveraging personal information to create value.
- **Privacy strategy and governance:** Assist with the design and implementation of a privacy strategy and governance framework that is right for your organisation.
- **Privacy programme implementation:** Design and embed pragmatic, fit for purpose privacy structures and controls to manage privacy risk as part of broader enterprise risk.
- **Privacy inventories and data flow mapping:** Identify personal information at rest /in motion to identify risk points and develop strategies to manage the risk in line with appetite.
- **Binding corporate rules and data processing agreements:** Our privacy lawyers can assist with the preparation of fit for purpose data processing agreements and binding corporate rules.
- **Training and awareness:** Develop and roll-out training and awareness programmes tailored to your organisation needs and audience.
- **Privacy impact assessments for business and technology projects or transformation programmes:** Identify issues early in a project/programme life cycles, reducing the operational risks of placing non-compliant systems, services or processes into production and helping to avoid re-work, subsequent investigations and related costs.
- **Privacy incident response:** Help establish sustainable incident response plans in advance of a data breach, and assist in data loss/breach investigations and remediation.

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# Annual life insurance industry update

## Date

22 September 2022

## Target audience

Financial directors and managers, risk and compliance officers, internal auditors and audit committee and board members.

## Course overview and objective

Your annual update of the most topical regulatory, tax, financial and other developments affecting the life insurance industry.

## Duration

Half day course

## Investment

R1,800 per delegate, excluding VAT

## Estimated CPD hours

4 hours

### For more information contact:

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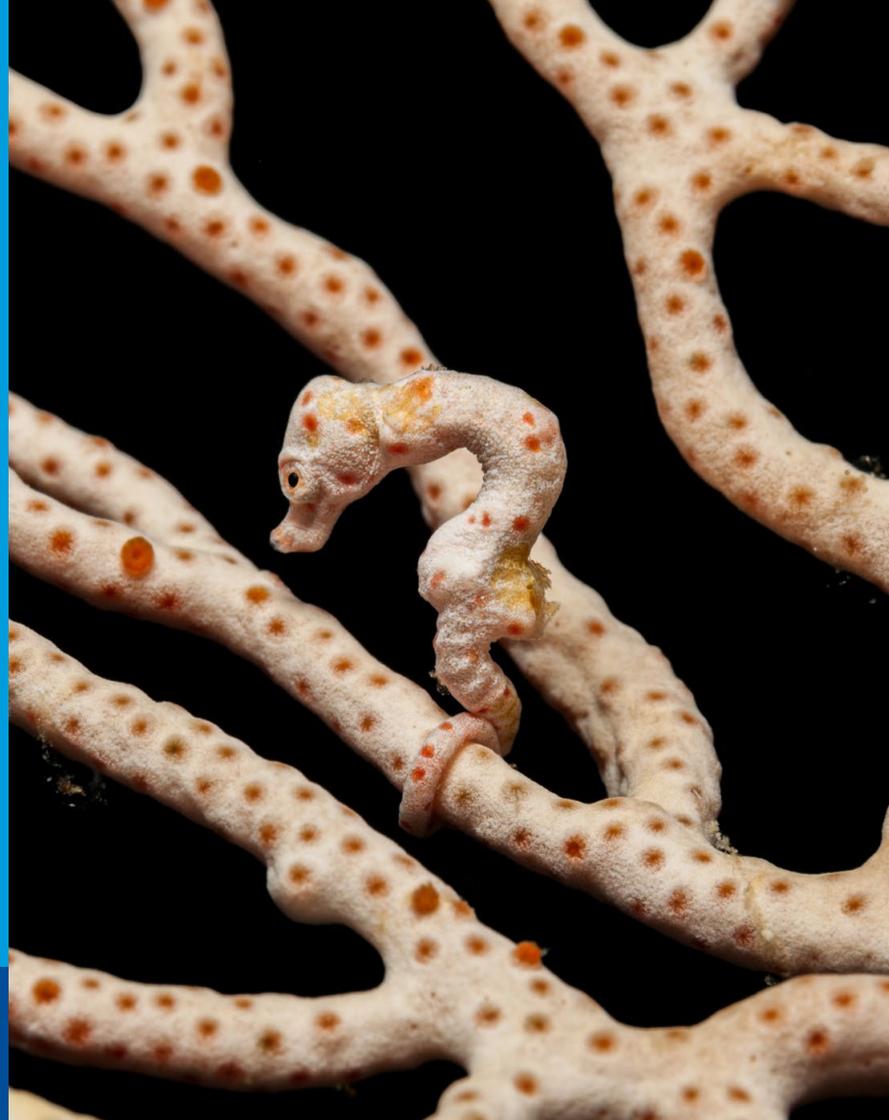
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# The future of regulatory: Altering your view

*The KPMG Regulatory Centre of Excellence challenges you to alter your view of the future of regulation.*

The benefits of regulation emerge when we are able to rise above the compliance lens, when we start to see regulation as a strategic advantage. These opportunities present a new way of thinking and simply put, alter our view of each piece of new regulation. The diverse backgrounds of our complement of specialists enable us to respond with future-centric solutions with the growth agenda in mind.

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# Insurance tax training

## Date

13 October 2022

## Target audience

Financial and tax managers.

## Course overview and objective

A training course aimed at assisting you in proactively identifying new and existing tax risks that affect life and non-life insurers as well as bringing you up to date with the most recent developments in applicable tax regulations.

## Duration

Half day course

## Investment

R1,800 per delegate, excluding VAT

## Estimated CPD hours

4 hours

## For more information contact:

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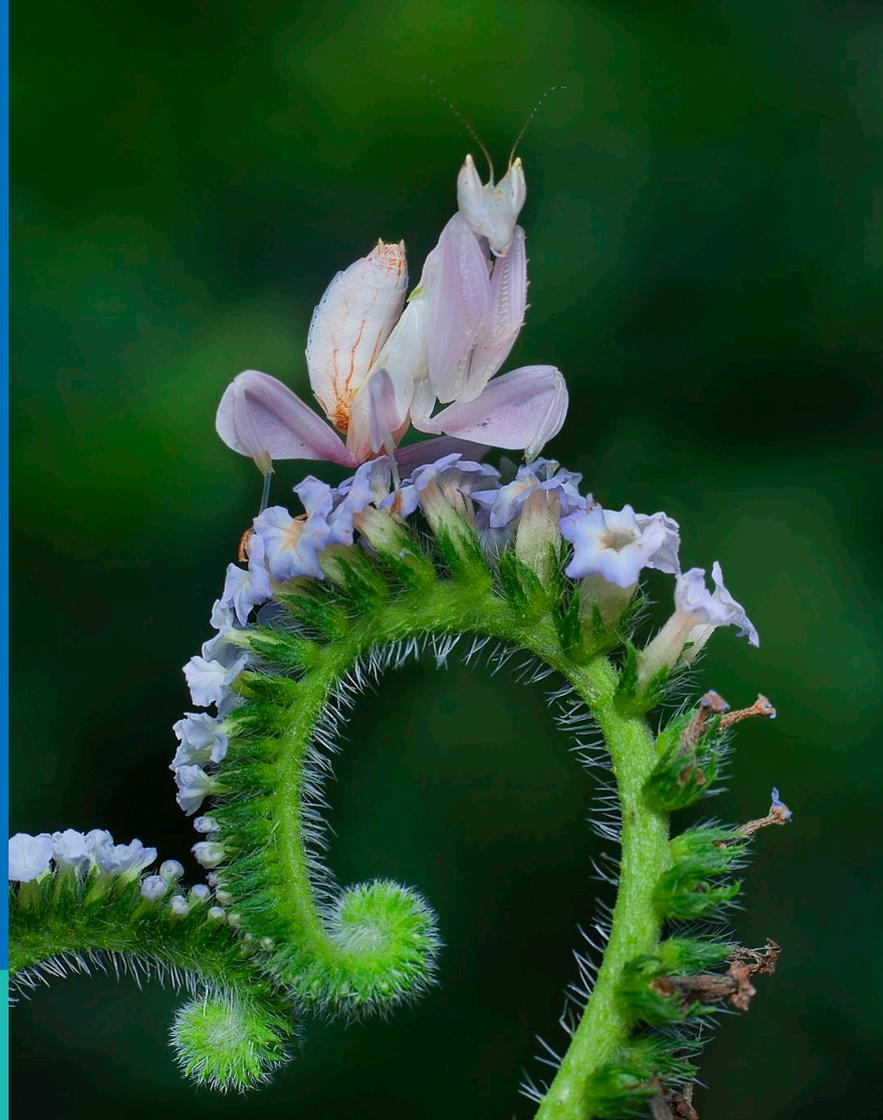
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# Insurance tax technology

The tax landscape has changed requiring a new way of thinking.

The tax executive needs to rethink, reimagine and reposition its tax function. This is necessary to ensure it achieves the company's future tax vision by developing a Target Operating Model to reduce cost, maintain and improve quality, unlock value and prepare for a digital future with improved efficiencies.

KPMG's Tax Technology Transformation Services team specialises in the digitisation and automation of the tax function through robotics and technology.

It all starts with a conversation about your organisation's unique tax challenges and aspirations in order to develop solutions that meet your immediate and long-term needs.

**For more information please contact:**

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# Insurance VAT training

## Date

20 October 2022

## Target audience

Financial and tax managers.

## Course overview and objective

A training course aimed at assisting you in proactively identifying new and existing VAT risks that affect insurance companies as well as bringing you up to date with the most recent developments in applicable VAT regulations.

## Duration

Half day course

## Investment

R1,800 per delegate, excluding VAT

## Estimated CPD hours

4 hours

### For more information contact:

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# Update for non-executive directors in the insurance industry - November edition

## Date

10 November 2022

## Target audience

Non-executive directors in the insurance industry.

## Course overview and objective

Update on the most recent developments to assist you in your role as a non-executive director in the insurance industry.

## Duration

Half day course

## Investment

This course is complimentary

## Estimated CPD hours

4 hours

### For more information contact:

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