



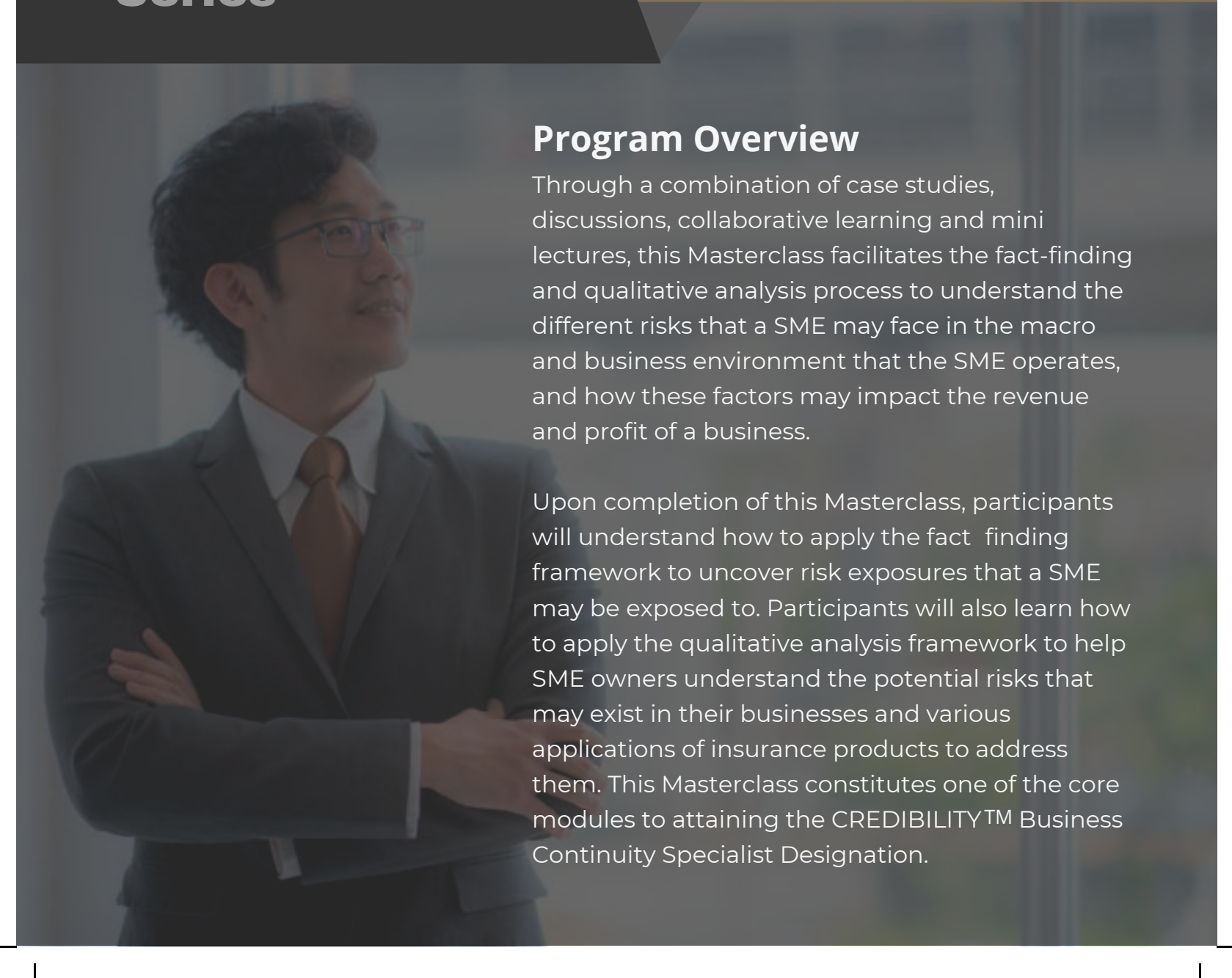
Financial Perspectives

Centre for Professional Excellence in
Advisory Competency and Ethics

A background image showing a group of four business professionals in a modern office setting. A man in a blue suit is standing and talking to a woman in a white blazer who is seated at a desk with a laptop. Two other men are seated at the desk, one looking at the laptop. The scene is brightly lit with large windows in the background.

Fact-Finding and Qualitative Analysis Frameworks


Course Prospectus
**SME Masterclass
Series**

A background image of a man in a grey suit and glasses, looking upwards and to the right with a thoughtful expression. His arms are crossed.

Program Overview

Through a combination of case studies, discussions, collaborative learning and mini lectures, this Masterclass facilitates the fact-finding and qualitative analysis process to understand the different risks that a SME may face in the macro and business environment that the SME operates, and how these factors may impact the revenue and profit of a business.

Upon completion of this Masterclass, participants will understand how to apply the fact finding framework to uncover risk exposures that a SME may be exposed to. Participants will also learn how to apply the qualitative analysis framework to help SME owners understand the potential risks that may exist in their businesses and various applications of insurance products to address them. This Masterclass constitutes one of the core modules to attaining the CREDIBILITY™ Business Continuity Specialist Designation.



Course Objectives

At the end of this Masterclass, participants will:

1. Understand the different types of business structures and its limitations,
2. Understand how qualitative factors within the operating environment of the SME may impact revenue and profit of the business.
3. Understand and apply the qualitative analysis framework to uncover risk exposures.
4. Understand and apply relevant insurance propositions to address risks identified.



Total Training Hours

Upon completion of this program, participants will be awarded the Certificate of Completion and 4 non-core CPD Training Hours



Course Fee

\$350 before GST



Who Should Attend?

Financial Planning Professionals, Bank Relationship Managers and Insurance Specialists, Insurance Agents



Funding

This program is IBF-FTS recognised and is eligible for funding under the IBF-FTS scheme.

Enquiry and Enrolment



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