Course Prospectus

# ILP Masterclass

## ILP Sales Masterclass

### Program Overview

Elevate your expertise in the Financial Services Industry through our ILP Sales Masterclass. This module integrates case studies, collaborative learning, and concise lectures to equip professionals with the skills to leverage Investment-linked policies (ILPs) effectively for diverse customer financial goals.

Learn to mitigate negative perceptions surrounding ILPs and explore tailored structures, benefiting various profiles from young adults to SME business owners. Discover suitable client segments for ILP recommendations, grasp the dual protection and investment aspects of ILPs, and analyze sub-fund fact sheets adeptly. This masterclass empowers you to skillfully apply ILPs to different client profiles, revolutionizing your ability to meet financial objectives for young adults, young children, and SME business owners.

## Course Objectives

a) Understand the negative stigma about Investment-linked policies (ILPs) and how to address them.

- • Overview of different types of ILP plans, including "grandfathered" structures
- • Reasons for the negative stigma and how to address them.
- • Understand the benefits of "modern" ILP structures and its benefits.
- • Compare ILP structure against buy-term-invest-the-difference.

b) Identify suitable client profiles and segments where ILPs are suitable recommendations.

c) Understand the protection and investment elements of ILP and how to analyse a sub-fund fact sheet.

d) Understand and apply ILPs to different client profiles:

- Young adults
- Young children
- SME business owners

## Total Training Hours

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

## Who Should Attend?

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

## Course Fee

$350 before GST

## Funding

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

## Enquiry and Enrolment

enquries@fp-edu.com

+65 8111 7890

www.fp-edu.com

Enrol Here