Financial Perspectives
Centre for Professional Excellence in Advisory Competency and Ethics

Course Prospectus

Retirement Planning Masterclass

Applying the Retirement Planning Process to Generate Sales Propositions

Module 3

Program Overview

In Module 3, master the art of client engagement by effectively conveying the significance of retirement planning and offering tailored solutions to bridge retirement gaps. Participants will adeptly apply our proprietary retirement planning process, guiding clients towards comprehensive and personalized retirement plans instead of generic product recommendations.

Explore the dynamics of the "retirement conversation" to foster meaningful client engagement concerning their retirement journey. By delving into our exclusive retirement planning process, participants will uncover a multitude of up-selling and cross-selling opportunities, leveraging both investment and insurance solutions. This module equips participants to tackle diverse client profiles, including High Income Employees ("HENRY"), Sole Proprietors (SP), Self-Employed Persons (SEPS), and SME Business Owners, empowering them to develop product structures that align seamlessly with each client's unique needs.

Course Objectives

a) Learn and apply the "retirement conversation" to engage with the client on their retirement discussion.

b) Understand and apply our proprietary retirement planning process to generate multiple up-selling and cross-selling opportunities using investments and insurance solutions.

c) Understand the common situation facing different profiles, and develop suitable product structures for the following client segments:

- High Income Employees ("HENRY")
- Sole Proprietors (SP) and Self-Employed Persons (SEPS)
- 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

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Enrol Here