The Risk School courses for 2009/2010 have been designed as a result of feedback from advisers dealing with the risk store and its services. Our curriculum will always be devised with **adviser feedback and need** as the key drivers. While we will always obtain accreditation for you, for our courses, we are not driven by regulatory requirements and mandated curricula when developing our educational courses. They will always be *practical, translatable to your business and of a quality you will be delighted with.*

Course 2

Making Business Succession Planning a Reality: the CVP you can offer

The drive to build this workshop came about as a result of witnessing many advisers coming out of technical BSP training and having no real way to link and apply their new knowledge, in practice, to a new SME advice service.
Sue Laing conducts this day and delivers it with a passion borne of witnessing many businesses benefit from the right advice about a topic the proprietors would never have otherwise face and addressed - if it hadn't been for committed advisers.

Aims

This course is designed to **remove the common psychological barriers to offering business succession planning** to SME clients and fill the skills gaps that hold advisers back. It focuses on:

- The value of offering BSP, for both adviser and client

Thereby establishing motivation.

- Debunking the myths which perpetuate a perception of complexity in BSP, which is overstated

Thereby removing any reluctance or fear associated with this type of business.

- The skill of engaging the small business client - from first meeting to finalising the business portfolio - by understanding their particular mental attitudes and concerns and thus being capable of communicating to them in their own 'language'.
- The practical delivery needs for effective BSP e.g. fact finding and needs analysis.

Thereby equipping advisers to deliver the advice effectively.

This in turn will serve to increase your revenue and expand your potential client base.

Learning Outcomes

After participating in this workshop, advisers will be able to:

- Discuss a business client's risks to secure that client's engagement – including questioning techniques
- Describe how BSP can provide peace-of-mind for that client – including questioning techniques
- Conduct a fact find to elicit the necessary information to proceed to advice
- Conduct a needs analysis to lead to recommendations for sums insured
- Drive and facilitate the liaison between lawyer, accountant and client
- Deliver the recommendations for BSP clearly and succinctly
- Secure the client's commitment to the solution
- Effectively manage the underwriting process

CPD Points AFA and FPA 7.25 points