The Risk School courses 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 6
The Sphere of Risk - rethinking the concepts of risk

Summary of Workshop

This session challenges advisers to stretch their advice process beyond the traditional family or business 'package' of insurances, to capture the risks that parties external to the client family may pose to that family, and also lock in earlier rather than later, the beneficiary relationships that will automatically spring from claims made. **A perfect workshop for wealth creation planners as well as life risk specialists.**

Aim

This workshop aims to:
Encourage in advisers a new and broader view of - and arm them with more effective ways to address - all the risks existing within their family and business 'sphere', not only those within the 'nuclear family'. Increased revenue is the ultimate result, along with more secure outcomes for clients.

Learning Outcomes

After participating in this workshop advisers will be able to:

- Position with clients the dual aspects of risk management (rather than the current singular focus)
- Adjust their fact finding techniques to capture more comprehensive and useful risk-to-client information
- Obtain referrals to extended family and other associated parties as a natural outcome of the advice process
- Develop a consistency of approach that will ensure beneficiaries are kept 'in the advice loop' both before and after a claim
- Optimise the funds-under-advice revenue for their own business and/or their referral partners' business(es)
- Improve the business outcomes of the life risk review process
- Develop and deliver, from all of the above, a more valuable client proposition via a more professional approach which will create a tangible 'point of differentiation'

Timing
3 hours

CPD Points to be up to AFA: 3 / FPA: 3