Adviser Evolve ™ Program - LEVEL 2: ENGAGE

The Art Of Strategy Presentation

AQ101SOA
AQ102SOA
AQ103SOA

About The Workshop

This workshop focuses on Adviser skills necessary to successfully present SoA strategies in a manner that builds trust and credibility in the adviser client relationship. Advisers often come up with practical and technically sound strategies for their clients. Their greatest challenge lies in communicating these strategies in clear simple language so the clients understand and see the value in taking up the recommendations. Have you ever wondered why clients choose one adviser over another? Is it the adviser's technical knowledge and expertise? Is it about the relationship? Or is it that the client feels that they are being heard and understood? This 1 day workshop explores SoA strategy presentation to assist advisers to confidently present their strategies in a manner that builds trust by maintaining a 'solutions' focused client-centric approach based on the client's goals and objectives. This Workshop provides advisers with a framework for presenting the simplest to the most complicated strategies within the SoA presentation. It focuses on the process to communicate the strategies in such a way that any client would be able to gain a thorough understanding of the strategy. In SoA strategy presentation communicating in the client's own language is key to getting the client's commitment and winning their relationship.

RG146 Compliance

This module fulfils ASIC's RG146 'Skills Requirements'- Present appropriate strategies and solutions to the client.

Workshop Skills Practice

Presenting strategy in every day language

Total Skills Practice duration: 60 minutes

Topics Covered

- Establishing and applying clients preferred presentation style
- Positioning the document and its purpose
- Unpacking the SoA and understanding its many segments
- Representational systems for effective communication
- 7-steps to simplifying strategy
- Discussing related fees & charges
- Utilising the Product Disclosure Statement correctly
- Mind mapping strategy

Materials Provided

Comprehensive participants guide and notes

On Successful Completion

You will be able to demonstrate that you are confident in answering questions about the SoA as a document and be able to present on the purpose and content of this document in a manner that educates and builds trust with the client. Confidence and heightened comfort levels in discussing and explaining investment strategies and recommendations, risk, superannuation strategies and fees and cash flows in a structured process driven manner.

Pre-requisites

AQ102FF-Exploring Client's Goal's & Objectives

Assessment

Post Workshop Assessment: Participants will demonstrate that they are confident and are able to present a full SoA using their coach as a client. They will receive verbal & written feedback from their coach and be deemed competent or not yet competent based on the results.

CPD Points

CPD points application in progress. Points may be awarded to this module late 2009.

Who is this workshop for?

- Individuals looking to enter the industry in a financial planning role
- Advisers wanting to excel in their client facing and client engagement skills and to improve their conversion rates
- Advisers currently completing their DFS or ADFS who want to gain the 'skills' that will help complement the technical studies undertaken in their diploma
- BDM's and financial planning managers who coach and train advisers on a daily basis

Location: Sydney/ Melbourne

Duration: 1 day

Your Investment:

$450 (inclusive of GST)

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