Course Outline & Overview

Financial Advice Framework

"Ignite Program"

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1. Course Description

The purpose of this eLearning course is to help increase sales and service results to Financial Service Professionals by providing a structured and standardised advice framework.

Upon completion of this course, the successful student will be equipped with:

- Effective techniques and questions to proficiently assess customer needs, goals and objectives;
- Techniques to link customer needs to the most appropriate financial solutions/s;
- Connect and build effective long-term client relationships that compels clients to act;
- Engage customers in an innovative and refreshing way to increase their ownership and understanding of the financial advice they are receiving;
- Increase transparency and engagement with clients about how the advice being provided is specifically and individually linked to their life journey and their personal goals.

Using a framework will help you to have deeper more meaningful conversations with your clients and will help to build on your skills as a professional adviser.

<u>The benefits of using a Structured Advice Framework include but is not limited to:</u>

- Helping advisers to build rapport and trust with their client's;
- Providing advisers with structure and direction for the client interviews;
- Helping advisers to build questioning skills and confidence needed to close a sale;
- Assisting advisers in increasing sales conversion;
- Ensuring consistency of material presented to client's;
- Helping client's to gain a clearer understanding of the Financial Planning process;
- Achieving more productive and meaningful outcomes from client interactions.

By following the information outlined in both the eLearning modules and the Financial Advice Framework workbook you will build your confidence to structure your interviews in a way that will increase your chance of a successful sale.

2. Course overview and summary

This eLearning program is split up into 6 eLearning modules that range from 30 to 45 minutes to complete. These modules are interactive in nature and include best practice video demonstrations, role plays and interviews.

Additionally, there is a Financial Advice Framework Workbook that is to be used in combination with the online modules as the learner works through the whole program.

3. Course aims

The aim of an Advice framework is to help provide Financial Service professionals with a clear and consistent sales process that helps to create more meaningful connections with their clients.

This can lead to Better Conversations, Better Compliance, Better Conversions, which can then lead to better results for all.

Completing it via an interactive eLearning system allows you to access the material at a time that best suits you and your business needs 24 hrs a day, 7 days a week.

4. Course learning outcomes and structure

Each eLearning module covers a range of topics therefore each module has different learning outcomes. However, all modules follow the same structure of taking the learner on a journey using the interactive modules all of which include best practice video demonstrations.

Throughout this process you will be asked to answer questions, complete scenarios and watch best practice videos.

5. Expectations of students

Refer to the Terms and Conditions Ignite, Accelerate, Velocity Programs outlined on the website.

https://performanceadvisorygroup.com.au/

6. Assessment

Each module covers off on a number of different learning outcomes. Throughout each module, you will be given the opportunity to practise and test your knowledge through a series of activities. On successful completion of each module you will be provided with a certificate. Additionally upon successful completion of each module you will be provided with Financial Planning Association (FPA) CPD hours.

7. Additional support for students

Email support is available to all students – info@performanceadvisorygroup.com.au

Recorded Monthly Coaching – recorded monthly coaching calls sharing best practice examples, conversations and challenges for owners, directions and financial planners and advisers.

Online Reporting – Online reporting at your fingertips to measure and manage your staff's engagement with the program via our Learning Management System (LMS).