



IFA Risk MasterClass

IFA Conference – Wed 13 July, Wellington Convention Centre

9.00am – 12.30pm

\$85 per person (IFA Members only)

Register in conjunction with your Conference Registration or email jacqui@conferenceteam.co.nz

Building on the old adage “Quality is remembered long after price is forgotten”, the IFA Risk Masterclass will dive deeply into a number of very important advice (and hence sales) opportunities. For the risk adviser at the top of their game the Masterclass will help you break through to a new plateau of advice.

In three interactive sessions presenters will challenge your thinking and provide their views in three key areas:

- Getting it right is more than just the cover
- Business insurance as the complete advice methodology; and
- Risky Regulation, or Regulation Rewards?

With business opportunities aplenty how can advisers ensure all stones are turned? What are some of the techniques you can use to position business insurance as a complete advice methodology? When at the boardroom table, what do you need to know and how can you garner the right information to ensure you are making the right recommendations to business owners? How important are issues around insurance trusts, buy sell agreement, ownership structures or valuation methodologies? What are some of the common and easy to make mistakes?

Regulation presents the need for advisers to reconsider their practices in many ways. But in change is opportunity. The opportunity to bring new revenue generating methods into your commission based business, position yourself in the clients eyes as a top class professional, and distinguish yourself from the average adviser. Be introduced to one method of integrating fees into your practice in a way the client will embrace, and also consider the interaction between generic forms of DI products and advisers professional excellence.

Each session will provide plenty of time for interaction and to ask questions, and debate important issues that will ultimately drive success. So, if you want to challenge your thinking and current business practices, sign up to the Risk Masterclass today.

Three Sessions run by:

Maurice Trapp, Director Ginger Group - Business Insurance, the complete advice methodology

Chris Pope, Director Chris Pope & Associates – Getting it right is more than just the cover

Tony Vidler, Director Strictly Business Ltd– Risky Regulation, or Regulation Rewards

