

FOR BANKS, INSURERS AND WEALTH ADVISORY TEAMS

Financial Planning

**CLIENT
ADVICE
PLANNING****4-DAY COURSE**

Build knowledge. Improve client discovery. Create better advice conversations.

CLASSROOM | ONLINE | BLENDED

Practical financial planning education with advanced tools.

A comprehensive financial planning programme for relationship managers, advisers and customer-facing teams. Participants build practical capability across client discovery, investment markets, insurance, portfolio construction, financial-plan preparation, adviser skills and compliance.

WHAT PARTICIPANTS WILL COVER

Client discovery, goals & needs

Structure richer conversations around client circumstances, goals, lifestyle needs, risk, income and capital requirements.

Investments, risk & portfolios

Understand asset classes, risk and return, diversification, asset allocation and goals-based portfolio construction.

Insurance & protection planning

Build confidence in insurance principles, protection needs analysis and the role of insurance in a financial plan.

Planning process, advice & compliance

Prepare and present recommendations professionally while applying adviser skills, documentation and conduct requirements.

Practical learning with optional tools and take-away resources.

Applied planning learning

Extensive practical financial-planning content designed for real client conversations and workplace application.

Optional Financial Planning Software

Optional access to Shoreline's digital fact-finder and planning support software for structured discovery, needs analysis and coaching.

Downloads & support documents

Comprehensive downloadable guides, templates, checklists and support documents for ongoing workplace use.



Let's discuss your financial planning learning priorities.

The programme can be customised for your product set, advice model, staff roles and compliance environment.

Start a conversation ->admin@shoreline-asia.com