Welcome to the 2020 TAL Risk Academy

2020 PROSPECTUS

TAL / Risk Academy

Contents

Helping your business prepare for a new era of advice

"Such a great workshop! It's the first time we're hearing positive ways to deal with this mammoth task of the exam. A really great way to engage us and take the pressure off."

FASEA Exam Masterclass student

"I take my hat off to the presenter, who was quite amazing!"

Income Protection Masterclass student

"A really great insight into the changing advice world."

Advice and Best Practice Masterclass student

"I will attend as many of these classes as I possibly can. I think they're so informative and interactive. This type of learning far exceeds what I'm normally exposed to"

Estate Planning Masterclass student

Foreword

From Beau Riley

In 2020, the TAL Risk Academy remains committed to supporting you in navigating the changes in our industry and meeting your education requirements with confidence.

TAL Risk Academy will continue to run a market-leading program, including our popular FASEA Exam Masterclasses and a range of other support programs:

University Pathways

We have partnered with Charles Sturt University, Deakin University and the University of New England to provide a University Pathways program to help you meet the education standards by recognising the learning you have undertaken through the TAL Risk Academy.

Focused learning

With the new Code of Ethics coming into effect in 2020, we have established a program with a focused range of courses to help you navigate the Code and integrate it successfully into your business.

CPD-aligned learning

All our courses are accredited with the AFA and/or FPA, and with more than 60 courses available online via our on-demand learning options, you can easily fulfill your CPD requirements with TAL Risk Academy on your schedule.

Professional Year support

To help your business integrate the Professional Year standard more easily, and to encourage new advisers to join the industry, the TAL Risk Academy is also developing a program to support the development of a Professional Year plan this year.

Continued Support for the FASEA Exam

FASEA Exam Masterclass

Due to the popularity of Risk Academy's FASEA Exam Masterclasses, new dates have been added for 2020 to support you in your preparation. This course will help you understand what key information your should be aware of, what materials you should be across as well as providing an opportunity to complete a practice exam, so you can sit the exam with confidence.

FIND OUT MORE

Latest FASEA Exam Updates Webinar

Covering the latest updates released from FASEA, this course is designed as a follow-up session for attendees of our FASEA Exam Masterclass. This course will cover the most recent updates, further training support on key areas you need to be across in the exam as well as practice exam questions.

FIND OUT MORE

MEET BEAU RILEY, HEAD OF LICENSEES AND PARTNERSHIPS

Beau joined TAL in 2011 and has over 19 years' experience in retail financial services, working primarily with national licensee groups and their advisers.

As the Head of Licensees and Partnerships, Beau leads TAL's strategic account management and licensee partnerships, creating and delivering initiatives that help licensees and advisers grow their life risk capabilities.

A key component of this is the TAL Risk Academy, designed to support the education and training of advisers and their support staff in a changing industry.

About the TAL Risk Academy

In 2020, TAL Risk Academy is continuing to support advisers with their education needs with its market-leading range of courses covering advice, ethics, business management and more.

TAL Risk Academy has also developed a range of support programs to help you meet your education and professional requirements with confidence, while also supporting your business with our new Professional Year program.

Now in its sixth year, the Risk Academy continues to deliver leading education designed for advisers, their business and clients, and we've also reached some incredible milestones along the way with your support.

29,500+
course enrolments since launch

$400K+
raised for charity since launch via our masterclasses

40+
on-demand courses so you can learn on your own schedule

40
new dates for our popular FASEA Exam Masterclass

17
new or updated courses launching in 2020

4.7/5
average adviser satisfaction score

The programs

The range of TAL Risk Academy courses continues to grow in 2020 and offers four tiers of learning so you can structure your course work in a way that suits you.

Chat to our sales team to create a tailored education plan to help you meet the new industry training requirements and grow your skills with the TAL Risk Academy.

Essentials

Essentials courses provide the foundation for working with TAL and in the advice industry, building your knowledge and skills around the operational aspects of client management and insurance. This program is best for advisers new to the industry or TAL, as well as support staff.

Advice

Advice courses will equip you with advanced strategies and grow your technical expertise to help you position insurance solutions to your clients. These courses suit all advisers keen to extend their knowledge and skills.

Masterclasses

Designed for experienced advisers, our Masterclasses explore thought-provoking, advanced concepts to help you create the best solutions for your clients.

Business Management

Business Management courses will set you up with skills and techniques in client engagement, practice management, marketing and a range of other topics, all designed to help grow your business.

Flexible learning options

Masterclasses and workshops
Face-to-face, interactive sessions held around the country. These are usually half-day sessions with lunch, and are always a great networking opportunity.

Webinars
Scheduled national webinars presented by our educators, which give you a chance to ask questions and engage with other students.

On-demand courses
Courses are available online and on-demand. With the majority of our courses available on-demand, you can learn and earn your CPD hours on your schedule.

Learning for today's adviser

In today's advice industry, it's never been more important to have an education and training system that allows you to enrol, learn and track your CPD accreditation easily.

TAL Risk Academy provides an extensive range of learning options that are easy to navigate and can help you maximise your time. Manage your learning for 2020 with the following features:

A single hub for all your Risk Academy records: the courses you've completed, test results and insights, downloadable certificates and more.

Powerful search features so you can find the course you want quickly, with topic filters and keyword searches.

Find out what's coming up, at a glance, on the dashboard.

Create and save tailored training plans to map out an education pathway that suits your goals.

Read course ratings and reviews from other students, and add your own.

Enrol for your courses in three easy steps

1. **Log in** to the Risk Academy website here
   Don't have an account? Register now
2. In the prospectus, click the **'Enrol Now'** or **'Launch'** link next to the course you'd like to take or browse the courses online
3. On the course web page, select the session you want to attend by clicking the **'Request'** button.

To learn more, contact your local BDM or the TAL Risk Academy team at **riskacademy@tal.com.au** or call us on **1800 748 682** (Monday – Friday, 9am – 5pm AET)

Planning your learning

Gain a strong understanding of the foundations of a topic and then deep-dive to build your expertise with these popular learning pathways.

ETHICS

Ethics and the Risk Management Process
On-demand
1 CPD hour

→ **Solving Your Ethics Dilemmas**
Webinar or on-demand
1 CPD hour

→ **Ethics and Dilemmas Masterclass**
5.5 CPD hours

FASEA

FASEA Exam Masterclass
6.5 CPD hours

→ **Latest FASEA Exam Updates Webinar**
Webinar
1 CPD hour

→ **Helping Advisers Meet Degree Requirements**
Webinar
1 CPD hour

→ **Navigating Professional Year Requirements**
Webinar
1 CPD hour

DIGITAL MARKETING

Website Fundamentals
On-demand
1 CPD hour

→ **Google Fundamentals**
On-demand
1 CPD hour

→ **Google Business Accounts**
On-demand
1 CPD hour

→ **Search Engine Optimisation**
On-demand
1 CPD hour

BUSINESS MANAGEMENT

What Does a Profitable Financial Planning Business Look Like?
Webinar
1 CPD hour

→ **What Advisers Should Charge for Advice**
Webinar
1 CPD hour

→ **Getting Your Value Proposition Right**
Webinar
1 CPD hour

BUSINESS INSURANCE

Intro to Business Insurance
On-demand
1 CPD hour

→ **Business Insurance Structures**
On-demand
1 CPD hour

→ **Business Insurance Masterclass**
5.5 CPD hours

ESTATE PLANNING

Intro to Estate Planning
On-demand
1 CPD hour

→ **Estate Planning**
On-demand
1 CPD hour

→ **Estate Planning Masterclass**
5.5 CPD hours

GRADUATE PATHWAY

Advice and Best Practice Masterclass
5.5 CPD hours

→ **Insurance in Super Masterclass**
5.5 CPD hours

→ **Estate Planning Masterclass**
5.5 CPD hours

→ **University Pathways Assignment**

UNDERWRITING

Intro to Underwriting
On-demand
1 CPD hour

→ **Financial Underwriting**
On-demand
1 CPD hour

→ **Income Splitting**
On-demand
1 CPD hour

→ **Underwriting and Claims Masterclass**
5.5 CPD hours

RISK PRODUCTS

Intro to Risk Products
On-demand
1 CPD hour

→ **Income Protection**
On-demand
1 CPD hour

→ **Income Protection Masterclass**
5.5 CPD hours

Earning your CPD hours in 2020

Pick and chose from each CPD area to easily reach your annual **40 CPD hours and category requirements**

Technical Competence

5 HOURS REQUIRED

Course	HOURS
☐ Advice and Best Practice Masterclass *Plus 1 hour in Client Care and Practice and 3.5 hours in Regulatory Compliance and Consumer Protection*	1
☐ Business Expense Insurance	1
☐ Business Insurance Masterclass	5.5
☐ Business Insurance Structures	1
☐ Comparing Retail, Group and Direct	1
☐ Essentials Workshop	5.5
☐ Estate Planning	1
☐ Estate Planning Masterclass	5.5
☐ FASEA Exam Masterclass *Plus 3.5 hours in Professionalism and Ethics and 2.5 hours in Regulatory Compliance and Consumer Protection*	1
☐ Financial Underwriting	1
☐ Future of Income Protection	1
☐ Income Protection	1
☐ Income Protection Masterclass *Plus 0.5 hours in Client Care and Practice and 0.5 hours in Regulatory Compliance and Consumer Protection*	4.5
☐ Income Splitting	1
☐ Insurance in Super	1
☐ Insurance in Super Masterclass	4.5
☐ Intro to Business Insurance	1
☐ Intro to Estate Planning	1
☐ Intro to Risk Products	1
☐ Intro to Underwriting	1
☐ Latest FASEA Exam Updates *Plus 0.5 hours in Professionalism and Ethics and 0.25 hours in Regulatory Compliance and Consumer Protection*	0.25
☐ Life is Super	1
☐ Liquidity and Debt Protection in SMSF	1
☐ Risk Cover Methodologies	1
☐ Risk Profiling: The Underwriter's Approach	1
☐ Super Insurance Strategies	1
☐ Tailoring your Advice for the Right Claims Outcome	1
☐ Understanding Cancer Conditions	1
☐ Understanding Diabetes	1
☐ Understanding Mental Health	1
☐ Understanding Preventative Screening	1
☐ Understanding the Small Print	1
☐ Underwriting and Claims Masterclass	5.5
TOTAL	______

More courses on the next page

Client Care and Practice

5 HOURS REQUIRED	HOURS
☐ Advice and Best Practice Masterclass *Plus 3.5 hours in Regulatory Compliance and Consumer Protection and 1 hour in Technical Competence*	1
☐ Client Engagement and You	1
☐ Engaging with Vulnerable and Disadvantaged Clients	1
☐ Income Protection Masterclass *Plus 0.5 hours in Regulatory Compliance and Consumer Protection and 4.5 hours in Technical Competence*	0.5
☐ Mental Wellbeing: Keeping It Simple	1
☐ Positioning Critical Illness Insurance	1
☐ Supporting Grieving Clients	1
☐ The Art and Science of Building Intentional Trust *Plus 0.5 hours in General*	0.5
☐ The five soft skills you must have to be here in five years	1
☐ What Advisers Should Charge for Advice	1
☐ What Does a Profitable Financial Planning Business Look Like *Plus 0.5 hours in General*	0.5
☐ Why Millennials and Technology are the Future of your Business	1
TOTAL	______

Professionalism and Ethics

9 HOURS REQUIRED	HOURS
☐ Ethics and Dilemmas Masterclass	5.5
☐ Ethics and the Risk Management Process	1
☐ FASEA Exam Masterclass *Plus 2.5 hours in Regulatory Compliance and Consumer Protection and 1 hour in Technical Competence*	3
☐ Latest FASEA Exam Updates *Plus 0.25 hours in Regulatory Compliance and Consumer Protection and 0.25 hours in Technical Competence*	0.5
☐ Managing Conflicts of Interest	1
☐ Respect Your Client's Confidentiality	1
☐ Solving Your Ethics Dilemmas	1
TOTAL	______

More courses on the next page

There's no required amount in the General category, but these courses can also help you reach your **40 CPD hours**

Our courses are accredited for FASEA CPD hours through the Financial Planning Association (FPA) and/or the Association of Financial Advisers (AFA). The FASEA CPD area may change as course accreditation is reviewed each year or where there is new course content.

Regulatory Compliance and Consumer Protection

5 HOURS REQUIRED

	HOURS
☐ Advice and Best Practice Masterclass *Plus 1 hour in Client Care and Practice and 1 hour in Technical Competence*	3.5
☐ FASEA Exam Masterclass *Plus 3.5 hours in Professionalism and Ethics and 1 hour in Technical Competence*	2.5
☐ Income Protection Masterclass *Plus 0.5 hours in Client Care and Practice and 4.5 hours in Technical Competence*	0.5
☐ Latest FASEA Exam Updates *Plus 0.5 hours in Professionalism and Ethics and 0.25 hours in Technical Competence*	0.25
TOTAL	______

General

	HOURS
☐ Effective Client Communications	1
☐ Fee for Advice Strategies	1
☐ Financial Fitness for Business	1
☐ Four Key Steps for Marketing Success	1
☐ Getting Your Value Proposition Right	1
☐ Google Business Accounts	1
☐ Google Fundamentals	1
☐ Helping Advisers Meet Degree Requirements	1
☐ How to Make Risk Cover More Attractive	1
☐ Introduction to Effective Marketing	1
☐ Intro to Claims	1
☐ LinkedIn Strategies	1
☐ Maximising Revenue from Risk Advice	1
☐ Navigating Professional Year Requirements	1
☐ Referral Techniques	1
☐ Search Engine Optimisation	1
☐ The Art and Science of Building Intentional Trust *Plus 0.5 hours in Client Care and Practice*	0.5
☐ Website Fundamentals	1
☐ What Does a Profitable Financial Planning Business Look Like *Plus 0.5 hours in Client Care and Practice*	0.5
TOTAL	______

2020 masterclasses and webinars

	ESSENTIALS WORKSHOPS	MASTERCLASSES	ADVICE WEBINARS	BUSINESS MANAGEMENT WEBINARS
FEB		☐ FASEA Exam Masterclass: Adelaide, Brisbane, Bunbury, Campbell Town, Geelong, Melbourne, Perth, Sydney		☐ Latest FASEA Exam Updates ☐ Helping Advisers Meet Degree Requirements
MARCH	☐ Essentials Workshop: Adelaide, Brisbane, Melbourne, Perth, Sydney	☐ Advice and Best Practice Masterclass: Adelaide, Brisbane, Melbourne, Perth, Sydney	☐ Future of Income Protection ☐ Solving your Ethics Dilemmas	
APRIL		☐ FASEA Exam Masterclass: Adelaide, Brisbane, Geelong, Gold Coast, Melbourne, Perth, Sydney	☐ Life is Super	☐ Navigating Professional Year Requirements
MAY		☐ Insurance in Super Masterclass: Adelaide, Brisbane, Melbourne, Perth, Sydney ☐ Income Protection Masterclass: Adelaide, Brisbane, Melbourne, Perth, Sydney		☐ The Art and Science of Building Intentional Trust ☐ What Does a Profitable Financial Planning Business Look Like
JUNE		☐ Ethics and Dilemmas Masterclass: Adelaide, Brisbane, Canberra, Geelong, Melbourne, Newcastle, Perth, Sydney, Toowoomba	☐ Understanding Australia's Business Structures	☐ Latest FASEA Exam Updates ☐ What Advisers Should Charge for Advice
JULY	☐ Essentials Workshop: Melbourne, Sydney	☐ FASEA Exam Masterclass: Adelaide, Brisbane, Melbourne, Perth, Sydney		☐ Getting Your Value Proposition Right
AUG		☐ Business Insurance Masterclass: Adelaide, Brisbane, Melbourne, Perth, Sydney	☐ Comparing Retail, Group and Direct	
SEPT		☐ FASEA Exam Masterclass: Adelaide, Brisbane, Bunbury, Melbourne, Perth, Sydney	☐ Understanding Mental Health	
OCT	☐ Essentials Workshop: Adelaide, Brisbane, Melbourne, Perth, Sydney	☐ Underwriting and Claims Masterclass: Adelaide, Brisbane, Melbourne, Perth, Sydney		☐ How to Make Risk Cover More Attractive
NOV		☐ Estate Planning Masterclass: Adelaide, Brisbane, Melbourne, Perth, Sydney		

2020 on-demand courses

ESSENTIALS COURSES ON-DEMAND

- Intro to Business Insurance
- Intro to Claims
- Intro to Estate Planning
- Intro to Risk Products
- Intro to Underwriting

ADVICE COURSES ON-DEMAND

- Business Expense Insurance
- Business Insurance Structures
- Estate Planning
- Ethics and the Risk Management Process
- Fee for Advice Strategies
- Financial Underwriting
- Income Protection
- Income Splitting
- Insurance in Super
- Liquidity and Debt Protection Insurance in SMSF
- Managing Conflicts of Interest
- Positioning Critical Illness Insurance
- Respect Your Client's Confidentiality
- Risk Cover Methodologies
- Risk Profiling: The Underwriter's Approach
- Super Insurance Strategies
- Supporting Grieving Clients
- Tailoring your Advice for the Right Claims Outcome
- Understanding Cancer Conditions
- Understanding Diabetes
- Understanding Preventative Screening
- Understanding the Small Print

BUSINESS MANAGEMENT COURSES ON-DEMAND

- Client Engagement and You
- Effective Client Communications
- Engaging with Vulnerable and Disadvantaged Customers
- Financial Fitness for Business
- Four Key Steps for Marketing Success
- Google Business Accounts
- Google Fundamentals
- Introduction to Effective Marketing
- LinkedIn Strategies
- Maximising Revenue from Risk Advice
- Mental Wellbeing: Keeping It Simple
- Referral Techniques
- Search Engine Optimisation
- The five soft skills you must have to be here in five years
- Website Fundamentals
- Why Millennials and Technology are the Future of Your Business

Essentials

Essentials courses are best for advisers new to TAL and support staff. They provide the foundation for building your knowledge and skills around risk products, underwriting and claims.

Essentials workshops are held right around the country several times a year, combining some of our Essentials topics and providing an introduction to working with TAL. They're also great networking opportunities. Or you can explore each course individually, through scheduled national webinars and via our on-demand library.

EARN UP TO 8.5 CPD HOURS

Workshop

Essentials Workshop

This is a half day course designed for advisers, paraplanners and client service managers who are new to the life insurance industry.

This course will see participants walk away understanding the need for insurance, how the different types of life insurance products and benefits work. Learn how to calculate benefit sums insured and produce client quotes. Then have an introduction to underwriting and claims to learn how to work efficiently with them.

This training is not a TAL-specific training session however we will be using the TAL website to learn how to prepare quotes and access insurance resources.

Sydney	12 March 21 July 27 October
Melbourne	12 March 21 July 27 October
Brisbane	12 March 27 October
Adelaide	12 March 27 October
Perth	12 March 27 October

6 hours (8.30am – 2pm)

CPD Hours 5.5 hours

FASEA CPD Area Technical Competence

→ ENROL NOW

On-Demand

Intro to Business Insurance

1 hour

Business insurance advice has grown significantly as a new avenue for advisers. And the opportunity to engage clients around business succession is still very evident, with only about 19% of business owners documenting a succession plan (Bentleys, 2017). Intro to Business Insurance will help you start to leverage this opportunity.

Presented by Scott Hoger, National Technical Manager

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Intro to Claims

1 hour

Claims requirements are often misunderstood, so advisers play a critical role in the claims process. This course discusses what to expect at claim time, tips to simplify claim requirements, and introduces ways to facilitate a smoother process, including tele-claims.

Presented by Rosemary Attard, Sales Development Specialist, and Audrey Le, Relationship and Training Specialist

CPD Hours	1 hour
FASEA CPD Area	General

LAUNCH

Intro to Estate Planning

1 hour

Intro to Estate Planning outlines two approaches which enable advisers to discharge their best interest duty in regard to estate planning. It provides practical tips and a suggested remuneration model to enable advisers to provide a limited service as a starting point.

Presented by David Glen, National Technical Manager

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Intro to Risk Products

Intro to Risk Products provides participants with an understanding of the different types of life insurance cover and makes comparisons to group and direct insurance, and workers' compensation offers to help you navigate these product types easily.

Presented by Jason Bamford, National Sales Development Manager

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Intro to Underwriting

TAL takes a flexible approach to underwriting, reflecting each applicants unique risk profile. Intro to Underwriting provides insight into our underwriting process, risk profiling approach and provides tips on how to get cases approved faster.

Presented by Dan Devine, Principal Underwriter

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Advice

Advice courses are suitable for all advisers and will equip you with advanced strategies and help you position insurance solutions with your clients. There are dozens of courses available, delivered by our sales, underwriting, claims and technical experts. And they're all available via webinar or on-demand, so you can grow your technical expertise and earn CPD hours when it suits you best.

EARN UP TO 28 CPD HOURS

Webinars

NEW COURSE

Future of Income Protection

This course provides an understanding of the changes to income protection advice that will result from the announcement by The Australian Prudential Regulation Authority (APRA) to address flaws in product design and pricing.

Presented by Scott Hoger, National Technical Manager, and Robert Powell, Senior Product Manager

4 March
1 hour
(12pm – 1pm AEDT)

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

ENROL NOW

"A great insight into the intention of the Code and how to interpret its application."

– Solving Your Ethics Dilemmas student

Solving Your Ethics Dilemmas

From 1 January 2020, financial advisers must comply with a code of ethics and be covered by a scheme under which their compliance with the code of ethics will be monitored and enforced. This course provides an overview of the Code of Ethics drafted by FASEA, and analyses the nature, scope and extent of each standard provided in this Code. It also provides practical examples of conduct which is not permitted by the Code. Participation and discussion is encouraged by posing hypothetical scenarios to the audience and seeking their reaction/response by voting.

Presented by Scott Hoger, National Technical Manager

Can't make the webinar? This course is also available on-demand

18 March
1 hour
(12pm – 1pm AEDT)

CPD Hours	1 hour
FASEA CPD Area	Professionalism and Ethics

ENROL NOW

NEW COURSE

Life is Super

There has been significant debate in the industry as to the use and appropriateness of insurance in superannuation. From ASIC Report 413, to the recent Productivity Commission review into the fiscal impacts of insurance in superannuation, most of the commentary has been overwhelmingly negative. There can however be significant advantages for clients using insurance in super, in fact for many, Life is Super. This session will focus on the advantages of insurance in superannuation including the tax, estate planning and cash flow implications. We will also provide a practical view on how to meet your best interest and FASEA Code of Ethics obligations when considering insurance in superannuation.

Presented by David Glen, National Technical Manager

15 April
1 hour
(11am – 12pm AEST)

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

ENROL NOW

NEW COURSE

Understanding Australia's Business Structures

This course explores the nature of typical Australian SME business structures, and focuses on the risks associated with those structures. The facilitators will then identify potential risk mitigation solutions when an unplanned event may occur. Solutions will be considered from an underwriting, tax and legal perspective. This webinar is a must for advisers seeking to work in the SME succession space and facing the challenge of quantifying the insurance needs of business owners.

Presented by David Glen, National Technical Manager, and Jo Hetherington, Head of Health Claims and Underwriting, Financial Risk

10 June
1 hour
(11am – 12pm AEST)

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

ENROL NOW

Comparing Retail, Group and Direct

This course will help you understand the key product differences within these very different life insurance categories, to be able to make an informed product comparison when presenting options to your clients.

Presented by Jason Bamford, National Sales Development Manager

19 August
1 hour
(11am – 12pm AEST)

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

ENROL NOW

Understanding Mental Health

This course will help you understanding what to expect from underwriting to claims for clients dealing with mental health conditions. It includes training you can use now and looks to future changes in the industry. Learn about the causes, signs and symptoms of mental illness, when and where to seek help, and practical strategies for helping clients.

Presented by Glenn Baird, Head of Mental Health

Can't make the webinar? This course is also available on-demand

9 September
1 hour
(11am – 12pm AEST)

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

ENROL NOW

On-Demand

Business Expense Insurance

Business Expense Insurance is often misunderstood. We need to be able to determine the types of businesses that would need this cover and identify where this need is potentially being missed. This course uses case studies to highlight the benefits of business expense cover, what it includes and what happens during the underwriting and claim processes.

Presented by Jo Hetherington, Head of Health Claims and Underwriting, Financial Risk

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Business Insurance Structures

Explore the various structures available for buy/sell, key person and debt protection cover. Business Insurance Structures looks at the tax treatment of each structure, as well as potential advantages, disadvantages and pitfalls.

Presented by David Glen, National Technical Manager

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Estate Planning

The Estate Planning course gives you a framework for creating an estate planning diagnostic, or fact find, and family tree. It also covers structures, helping you to identify estate planning risks.

Presented by David Glen, National Technical Manager

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

NEW COURSE

Ethics and the Risk Management Process

We explore how ethics interacts with the risk advice process, and immerse the audience using polls in an ethical scenario as part of an interactive risk insurance case study.

Presented by David Glen, National Technical Manager

1 hour

CPD Hours	1 hour
FASEA CPD Area	Professionalism and Ethics

LAUNCH

Fee for Advice Strategies

The Fee for Advice Strategies course looks at different ways to charge for your advice. We provide examples of what other advisers are doing and options available to you to consider how to professionally price your advice.

Presented by David Glen, National Technical Manager

1 hour

CPD Hours	1 hour
FASEA CPD Area	General

LAUNCH

Financial Underwriting

This course covers the principles of financial underwriting for income protection and business expense insurance, and explores business insurance, specifically debt protection, buy/sell and key person cover.

Presented by Dan Devine, Principal Underwriter, and Jo Hetherington, Head of Health Claims and Underwriting, Financial Risk

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Income Protection

This course will help you to grow your knowledge of income protection products with a particular look into the key features and benefits of IP.

Presented by Jason Bamford, National Sales Development Manager

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Income Splitting

This course will give you the tools you need to determine whether income splitting arrangements are in place, so you can factor them in when calculating insurable income. It's designed to help identify the true income generators in a business to ensure you calculate the appropriate sum insured. And we'll breakdown more complicated scenarios through case studies to help you become an income splitting expert.

Presented by Dan Devine, Principal Underwriter

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Insurance in Super

The Insurance in Super Webinar addresses two fundamentals of effective insurance through super. It looks at the respective tax and Superannuation Industry Supervision (SIS) Act treatment of contributions and premiums, and uses case studies to help participants identify situations where this structure is appropriate.

Presented by Scott Hoger, National Technical Manager

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Liquidity and Debt Protection Insurance in SMSF

Many SMSFs have achieved efficiencies through gearing and holding fixed property. However, if a member dies or becomes disabled, this could create a liquidity crisis. This course explores debt protection cover inside super, the regulatory and tax treatment of premiums and claims proceeds, and preservation of equity between members.

Presented by Scott Hoger, National Technical Manager

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Managing Conflicts of Interest

Conflicts of interest are part of life when we advise multiple clients and entities, but we need to manage and avoid these conflicts being an issue in our business relationships. Using an ethical lens, this course will use case studies for both small and large adviser practices to show how you can identify and manage conflicts of interest in your practice.

Presented by David Glen, National Technical Manager

1 hour

CPD Hours	1 hour
FASEA CPD Area	Professionalism and Ethics

LAUNCH

Positioning Critical Illness Insurance

This course will help you with positioning Critical Illness Insurance. Including information to share with prospective clients, treatment costs and events with costs that are not PBS approved. We cover structuring this type of cover and how to approach adviser conversations to help get more Australians covered.

Presented by Jason Bamford, National Sales Development Manager

1 hour

CPD Hours	1 hour
FASEA CPD Area	Client Care and Practice

LAUNCH

Respect Your Client's Confidentiality

A complex issue facing advisers is the privacy and confidentiality of client information. This course will provide examples of what leading adviser practices do to address this and adhere to best practices.

Presented by David Glen, National Technical Manager

1 hour

CPD Hours	1 hour
FASEA CPD Area	Professionalism and Ethics

LAUNCH

Risk Cover Methodologies

The Risk Cover Methodologies course shares options available to you on how to calculate life insurance sums insured using case studies and examples.

Presented by Scott Hoger, National Technical Manager

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Risk Profiling: The Underwriter's Approach

Breaking down the underwriter's risk profiling approach, this course touches on the foundational underwriting principles relevant to beginners and advanced attendees. This foundation is then practically applied to real case studies. You will then be able to apply these principles to provide more certainty for you and your client early on as to the likely outcome.

Presented by Dan Devine, Principal Underwriter

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Super Insurance Strategies

1 hour

Super Insurance Strategies explores the risk advice opportunities presented as a result of recent amendments to superannuation legislation. With a focus on risk advice, this presentation identifies the key superannuation legislation changes along with their associated insurance advice implications.

You'll gain practical insights and strategies on how financial advisers can use these superannuation changes to their client's advantage, with opportunities for both new and existing clients. We finish the presentation by recapping the Stronger Super changes from 2014, with a particular focus on income protection in superannuation.

Presented by Scott Hoger, National Technical Manager

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Supporting Grieving Clients

1 hour

As a financial adviser, you will be called by clients and their grieving families when faced with an unknown and scary future. What's the best way to talk with a grieving person and work with the family? Supporting Grieving Clients is a course to help you develop some of the skills you will need when your clients need you most.

Presented by Glenn Beard, Head of Mental Health

CPD Hours	1 hour
FASEA CPD Area	Client Care and Practice

LAUNCH

“Great help in dealing with grieving clients and friends.”

– Supporting Grieving Clients student

Tailoring your Advice for the Right Claims Outcome

1 hour

Your advice should provide your clients with the best chance of meeting all eligible claims. We share claims examples to help you with positioning risk advice.

Presented by Scott Hoger, National Technical Manager, and Nerida Cook, Team Leader, Claims

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

LAUNCH

Understanding Cancer Conditions

This course will guide you through cancer staging, diagnosis, investigations, treatments and prognosis, so you can deliver the best possible risk advice and support from pre-assessments through to claims. And we'll break down the medical terminology relevant to both underwriting and claim product definitions requirements.

Presented by Priya Chagan, Chief Medical Officer, Health Services

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

→ LAUNCH

Understanding Diabetes

NEW COURSE

Diabetes affects 1.7 million Australians. This course will help you understand more about the different types of diabetes, risk factors and complications. You'll also learn about tests to diagnose diabetes, treatment options and the importance of managing blood sugar.

Presented by Priya Chagan, Chief Medical Officer, Health Services

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

COMING SOON

Understanding Preventative Screening

Insurance companies are now rewarding clients for taking steps to monitor and improve their health. This course will share preventive and screening services designed to keep Australians healthy and find problems early, when treatment is most effective, as well as ways to leverage this knowledge for the benefit of your clients.

Presented by Dr Sally Phillips, General Manager, Health Services

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

→ LAUNCH

Understanding the Small Print

This course will provide training on what to look for in the policy document to help your clients with navigating risk advice. Using real examples from TAL claims experience, this course will provide you with confidence in understanding the small print.

Presented by Jason Bamford, National Sales Development Manager, and Nerida Cook, Team Leader, Claims

1 hour

CPD Hours	1 hour
FASEA CPD Area	Technical Competence

→ LAUNCH

Masterclasses

Designed for experienced advisers, our masterclasses explore thought-provoking, advanced concepts. They're a great opportunity to network with peers and our technical team – including David Glen and Scott Hoger – while gaining the insights and tools you need for a changing industry.

EARN UP TO 45 CPD HOURS

FASEA Exam Masterclass

The Financial Adviser Examination is an essential component of the educational qualifications that all advisers will need to pass before they can provide personal advice to retail clients.

Existing advisers are required to pass the exam. New entrants or those returning to the industry are required to pass the exam before quarter three of their professional year.

The FASEA Masterclass is designed to support advisers in the preparation for the exam, providing key information to be aware of, the materials to be across and how to prepare to be successful with the test, first time.

Presented by David Glen, National Technical Manager, and Scott Hoger, National Technical Manager

See following page for dates

5.5 or 6.5 hours (10am – 3.30pm in Campbell Town on 11/2 and Melbourne on 7/2; 8.30am – 2pm in all other locations)

"Fantastic. Best FASEA preparation tools I've had so far."

– FASEA Exam Masterclass student

FASEA Exam Masterclass Dates

Sydney	4 February 27 February 28 February 1 April 2 April 1 July 30 July 31 July 8 September	**Campbell Town**	11 February
		Geelong	14 February 24 April
		Adelaide	18 February 29 April 28 July 29 July 22 September
Brisbane	6 February 25 February 26 February 21 April 17 July 16 July 17 September 18 September	**Perth**	20 February 7 April 22 July 23 July 24 September
		Bunbury	21 February 25 September
Melbourne	7 February 12 February 13 February 23 April 14 July 15 July 15 September 16 September	**Gold Coast**	22 April
		Wollongong	2 July

CPD Hours 6.5 hours

FASEA CPD Area Professionalism and Ethics (3 hours)
Regulatory Compliance and Consumer Protection (2.5 hours)
Technical Competence (1 hour)

→ **ENROL NOW**

"Excellent guide to help in preparing for FASEA Exam."

– FASEA Exam Masterclass student

"Well executed. Digestible content. Good use of practice questions."

– FASEA Exam Masterclass student

NEW COURSE CONTENT

Advice and Best Practice Masterclass

Our new Advice and Best Practice Masterclass will provide a practical guide for best practice risk advice in our changing industry. This masterclass takes key learnings from industry reform and uses an interactive format that shares different perspectives to help you transition your advice successfully for the future.

Presented by David Glen, National Technical Manager, and Scott Hoger, National Technical Manager

Perth	5 March
Sydney	10 March
Adelaide	17 March
Melbourne	19 March
Brisbane	26 March

5 hours (8.30am – 2pm)

CPD Hours 5.5 hours

FASEA CPD Area Client Care and Practice (1 hour)
Regulatory Compliance and Consumer Protection (3.5 hours)
Technical Competence (1 hour)

ENROL NOW

NEW COURSE CONTENT

Insurance in Super Masterclass

Our new Insurance in Superannuation Masterclass helps you learn when to implement insurance in superannuation strategies and be confident with tax, code of ethics and estate planning implications.

Many clients will benefit from insurance in super arrangements, which are an important ingredient in the under-insurance solution mix. This course provides an in-depth understanding of the major issues confronting insurance in superannuation when considering the FASEA Code of Ethics and ASIC facilitative compliance. Participants will be given the opportunity to test their knowledge of these issues with a series of interactive case studies and discussions by the facilitators, giving you the knowledge and tools you need to deliver solutions inside and outside of super.

Presented by David Glen, National Technical Manager, and Scott Hoger, National Technical Manager

Sydney	5 May
Brisbane	6 May
Perth	7 May
Melbourne	12 May
Adelaide	19 May

5 hours (8.30am – 2pm)

CPD Hours 5.5 hours

FASEA CPD Area Technical Competence (4.5 hours)
Regulatory Compliance and Consumer Protection (1 hour)

ENROL NOW

"Great content. Great presentation. This was really practical and helpful."

– Insurance in Super Masterclass student

NEW COURSE CONTENT

Income Protection Masterclass

Our new Income Protection Masterclass provides you with the knowledge and skills to manage new regulation and product changes coming in to effect in 2020.

In light of the regulatory change resulting from the Royal Commission into Banking and Financial Services and with product change on the horizon with APRA looking to address the profitability concerns relating to Income Protection, advisers are likely to see significant change to the financial advice and advice processes around this product. This masterclass will help you understand how you can meet the challenge as well as the taxation implications associated with income protection along with claims and income protection in superannuation.

Presented by David Glen, National Technical Manager, and Scott Hoger, National Technical Manager

Perth	19 May
Brisbane	26 May
Sydney	27 May
Melbourne	28 May
Adelaide	29 May

5 hours (8.30am – 2pm)

CPD Hours 5.5 hours

FASEA CPD Area Client Care and Practice (0.5 hours)
Regulatory Compliance and Consumer Protection (0.5 hours)
Technical Competence (4.5 hours)

→ **ENROL NOW**

"This masterclass was excellent. Well structured and got to the point. Scott was an excellent presenter."

– Income Protection Masterclass student

NEW COURSE

Ethics and Dilemmas Masterclass

Our new Ethics and Dilemmas Masterclass will help you understand and navigate the FASEA Code of Ethics and help you resolve your ethical challenges and dilemmas within the framework for the advice industry. Ethical dilemmas confront financial advisers on a daily basis. A financial adviser cannot make any professional or advice decision without considering its ethical consequences and navigating this can be confusing at times. This masterclass helps advisers commence the ethical journey by providing an outline of ethical frameworks governing the behaviour of professionals, and how dilemmas are resolved within these frameworks. We then build on this foundation by providing a detailed analysis of the FASEA Code of Ethics accompanied by examples provided by FASEA. The facilitators and the participants then focus on ethical challenges unique to providing insurance advice and explore possible ways of resolving these challenges through interactive case studies. Examples include referral arrangements, conflicts of interest, and switching insurance policies. Participants will also have the opportunity to share ethical dilemma experiences with colleagues, and to gauge the feelings of fellow participants via regular polling throughout the Masterclass.

Presented by David Glen, National Technical Manager, and Scott Hoger, National Technical Manager

Perth	4 June
Canberra	15 June
Sydney	16 June
Newcastle	17 June
Brisbane	18 June
Toowoomba	19 June
Adelaide	23 June
Melbourne	25 June
Geelong	26 June

5 hours (8.30am – 2pm)

CPD Hours	5.5 hours
FASEA CPD Area	Professionalism and Ethics

ENROL NOW

"Fantastic, as always. Thoroughly enjoyed it. Case studies with this are key and there were plenty today."

– Business Insurance Masterclass student

NEW COURSE CONTENT

Business Insurance Masterclass

Become an expert in the small and medium-sized business space to help you leverage the opportunity in the much-neglected business owner market. The session explores the end-to-end business succession advice process through role plays to help with client engagement and case studies to avoid financial underwriting pitfalls. It allows helps you with develop specific strategies to make sure your clients receive value for a lifetime of hard work when exiting a business on a voluntary or involuntary basis.

Presented by David Glen, National Technical Manager, and Jo Hetherington, Head of Health Claims and Underwriting, Financial Risk

Melbourne	4 August
Brisbane	6 August
Sydney	11 August
Adelaide	18 August
Perth	20 August

5 hours (8.30am – 2pm)

CPD Hours	5.5 hours
FASEA CPD Area	Technical Competence

ENROL NOW

NEW COURSE

Underwriting and Claims Masterclass

The new Underwriting and Claims Masterclass will address the major issues in the risk advice space in the current climate, putting the best interest of the client at the forefront of advice. It will identify the potential problems you face from initial appointment through to claims for your clients.

This practical, interactive masterclass will help you obtain the best underwriting outcome for your clients. Designed to help you to obtain the right information, avoid mistakes and submit the right solution the first time, the course is company agnostic and uses case studies to explore solutions for clients with health conditions; how leading advisers manage pre-assessments; real case studies for calculating sums insured for lump sum and income protection; and tips and traps to make sure there are no surprises at claim time.

Presented by Dan Devine, Principal Underwriter, and Nerida Cook, Team Leader, Claims

Melbourne	7 October
Brisbane	14 October
Sydney	15 October
Adelaide	20 October
Perth	28 October

5 hours (8.30am – 2pm)

CPD Hours	5.5 hours
FASEA CPD Area	Technical Competence

ENROL NOW

Estate Planning Masterclass

NEW COURSE CONTENT

Get an advanced understanding of estate planning advice through our new Estate Planning Masterclass.

In an ever changing regulatory environment, financial advisers must determine how best to provide appropriate estate planning advice that meets their regulatory obligations. Using case studies and peer experiences, this masterclass will help you navigate a road map of the estate planning process, focusing on ensuring the right funds end up in the right hands, at the right time.

Presented by Scott Hoger, National Technical Manager

Sydney	5 November
Melbourne	11 November
Brisbane	12 November
Adelaide	17 November
Perth	19 November

5 hours (8.30am – 2pm)

CPD Hours 5.5 hours

FASEA CPD Area Technical Competence

ENROL NOW

> "Best masterclass I've been to for many years! I learnt so much in five hours – time well spent."
>
> **– Estate Planning Masterclass student**

Help us give back

A nominal $55 fee applies to Masterclasses, with all proceeds donated to charity.

To date, we've raised over $400,000 for the Australian Business and Community Network, which provides education and mentoring programs for disadvantaged students.

Business Management

Our Business Management courses are suitable for all advisers and support staff, and focus on equipping you with tools, skills and insights that will help grow your business through greater engagement from your existing clients and maximising opportunities to acquire new ones.

The courses are presented by our team of specialists, as well as leading industry and subject matter experts, across a huge range of topics: sales, practice management, HR, social media, and many more.

EARN UP TO 24 CPD HOURS

Webinars

NEW COURSE CONTENT

Latest FASEA Exam Updates

Covering the latest updates released from FASEA, this course is designed as a follow-up session for attendees of our FASEA Exam Masterclass. This course will cover the most recent updates, further training support on key areas you need to be across in the exam as well as practice exam questions.

Presented by David Glen, National Technical Manager, Scott Hoger, National Technical Manager, and Jason Bamford, National Sales Development Manager

Can't make the webinar? This course is also available on-demand

5 February
1 hour
(12pm – 1pm AEDT)

3 June
1 hour
(11am – 12pm AEST)

CPD Hours	1 hour
FASEA CPD Area	Professionalism and Ethics (0.5 hours) Regulatory Compliance and Consumer Protection (0.25 hours) Technical Competence (0.25 hours)

ENROL NOW

NEW COURSE

Helping Advisers Meet Degree Requirements

This course provides a framework to help financial planners with study. It focuses on ten of the most common challenges faced in higher education including tips for essay writing, referencing sources and how to apply your studies to help clients.

Presented by Marc Olynyc, Senior Lecturer in Financial Planning and Superannuation, Deakin University

19 February
1 hour
(12pm – 1pm AEDT)

CPD Hours	1 hour
FASEA CPD Area	General

ENROL NOW

NEW COURSE

Navigating Professional Year Requirements

Aspiring financial planners are now required to undertake a Professional Year, a year of workplace training and 100 hours of structured learning. This course provides support on how to manage this professional year and tools practices and licensees can draw on to help new financial planners transition in to the industry.

Presented by Joanna Matthew, Head of Education at Financial Planning Association of Australia, Alisdair Barr, Founder and Managing Director, Grad Mentor, and Jason Bamford, National Sales Development Manager

29 April
1 hour
(11am – 12pm AEST)

CPD Hours	1 hour
FASEA CPD Area	General

ENROL NOW

NEW COURSE

The Art and Science of Building Intentional Trust

It has never been more important to get your relationships right to attract and retain clients. Although it is important to have comprehensive technical knowledge, it needs to be easily related and communicated with clients. At the core of this is trust. This course will share skills and training to help deliver the best quality advice to your clients.

Presented by David Penglase, Author and Behvioural Scientist

6 May
1 hour
(11am – 12pm AEDT)

CPD Hours	1 hour
FASEA CPD Area	Client Care and Practice (0.5 hours) General (0.5 hours)

ENROL NOW

NEW COURSE

What Does a Profitable Financial Planning Business Look Like

This course, presented by Rob Jones, Director at Pelaton Partners, explores the ways in which financial advice firms should reconsider their pricing models to encompass all aspects of their expertise, including the intangible factors that contribute to the quality of services they provide.

From modifying your current business plan to project management and implementation, Rob's insights will help guide you towards unlocking your firm's full potential.

Presented by Rob Jones, Director, Pelaton Partners

20 May
1 hour
(11am – 12pm AEST)

CPD Hours	1 hour
FASEA CPD Area	Client Care and Practice (0.5 hours) General (0.5 hours)

ENROL NOW

NEW COURSE

What Advisers Should Charge for Advice

With the constant industry changes, it's more important than ever to get your pricing model right. This presentation shares a series of pricing models from different adviser practices. Whether you are a holistic planner or a risk specialist, find out what you should be charging and the value of your advice.

Presented by Elixir Consulting

24 June
1 hour
(11am – 12pm AEST)

CPD Hours	1 hour
FASEA CPD Area	Client Care and Practice

ENROL NOW

NEW COURSE

Getting Your Value Proposition Right

With our industry undergoing all sorts of changes, it's never been so important to help your clients understand the value you provide.

In this practical session, we'll help you create – or update – your value proposition and key marketing messages to ensure they're working as hard as they can to meet your business goals, engage existing clients and, of course, connect you with the types of new clients you want.

Presented by Tony Vidler, Business Adviser and Sales Training Coach

8 July
1 hour
(11am – 12pm AEST)

CPD Hours	1 hour
FASEA CPD Area	General

ENROL NOW

NEW
COURSE
CONTENT

How to Make Risk Cover More Attractive

Delivering best practice insurance sales skills, this course aims to make risk cover easier to present to clients, in turn helping you to convert prospects to customers. Covering the sales process from positioning the offer, to objection handling and delivering difficult underwriting decisions more effectively, you'll learn the key principles of influence to help make life insurance an attractive and desirable option for your clients.

Presented by Tony Vidler, Business Adviser and Sales Training Coach

Can't make the webinar? This course is also available on-demand

21 October
1 hour
(12pm – 1pm AEDT)

CPD Hours	1 hour
FASEA CPD Area	General

ENROL NOW

On-Demand

Client Engagement and You

This course covers the intricacies of human thought and behaviour. You will learn the secrets of how to communicate more effectively with your clients, your staff and your peers; enabling you to transform the results you produce.

Presented by Tony Vidler, Business Adviser and Sales Training Coach

1 hour

CPD Hours	1 hour
FASEA CPD Area	Client Care and Practice

LAUNCH

NEW
COURSE

Effective Client Communications

Learn how to develop a successful communications strategy for your business by building a strong understanding of the many diverse ways you can communicate with your clients and know what will work best for each client demographic. Also learn about key trends and new communication methods that can help you stay connected with your clients more easily.

Presented by TAL Marketing Team

1 hour

CPD Hours	1 hour
FASEA CPD Area	General

COMING SOON

NEW COURSE

Engaging with Vulnerable and Disadvantaged Customers

1 hour

In line with the Code of Ethics that comes in to effect on 1 January 2020, learn how to effectively identify and assist vulnerable and disadvantaged clients who require additional support, explanation, or time to make informed and considered choices.

Presented by Louise Campbell, Principal, Consulting | Social Ventures Australia

CPD Hours	1 hour
FASEA CPD Area	Client Care and Practice

LAUNCH

Financial Fitness for Business

1 hour

Financial Fitness for Business highlights how the most successful financial advisers have an unwavering focus on building profitable and sustainable businesses. The course focuses on what strategies a business needs to be financially fit including, setting a clear vision, introducing efficiencies and structuring a revenue growth plan.

Presented by David Glen, National Technical Manager

CPD Hours	1 hour
FASEA CPD Area	General

LAUNCH

NEW COURSE

Four Key Steps for Marketing Success

1 hour

Build out a simple and effective plan for your marketing activity in four steps. From understanding your business goals and clients, through to implementing and measuring your plan, this course will help you launch your marketing activity with approachable content and relevant case studies.

Presented by TAL Marketing Team

CPD Hours	1 hour
FASEA CPD Area	General

COMING SOON

Google Business Accounts

1 hour

When people search for you, does your phone number appear? Is the correct address and website listed? Control how your business appears on Google Search and Maps without spending a cent. Learn how to set up an account and see why it's such a powerful tool for business.

Presented by Ken Wong, Senior Manager, Digital Intelligence

CPD Hours	1 hour
FASEA CPD Area	General

LAUNCH

Google Fundamentals

1 hour

Google is the world's most used search engine and offers many benefits to small businesses. Tailored to financial advisers, this course provides tools to help your business rank on this platform specifically when prospective clients are searching for insurance and advice. An ideal course for advisers with websites receiving little attention, we will provide tips for those with limited time and where to get further help.

Presented by Ken Wong, Senior Manager, Digital Intelligence

CPD Hours	1 hour
FASEA CPD Area	General

LAUNCH

NEW COURSE

Introduction to Effective Marketing

1 hour

Get a strong understanding of key marketing approaches and how they can be applied effectively for an advice business. From brand and strategy, key marketing channels as well as helpful resources and templates, this course will help you navigate an effective marketing approach for your business.

Presented by TAL Marketing Team

CPD Hours	1 hour
FASEA CPD Area	General

COMING SOON

BUSINESS MANAGEMENT COURSES

LinkedIn Strategies

1 hour

Are you on LinkedIn but not sure how to get the most out of it? LinkedIn Strategies for financial advisers will help you master this powerful tool to build your online brand, generate leads with new clients, and connect with referral partners.

Presented by Tony Vidler, Business Adviser and Sales Training Coach

CPD Hours	1 hour
FASEA CPD Area	General

LAUNCH

Maximising Revenue from Risk Advice

1 hour

This course introduces the success formula for maximising revenue from risk advice by showing you how to influence the sales process with practical ideas and tips to increase production and revenue. For those wanting to expand into business risk, we dispel some of the myths around the difficulty to penetrate this market, showing you how to open up risk management engagements with business clients.

Presented by Tony Vidler, Business Adviser and Sales Training Coach

CPD Hours	1 hour
FASEA CPD Area	General

LAUNCH

Mental Wellbeing: Keeping It Simple

1 hour

With the changing environment for financial advisers, stress levels are higher than years past. Whilst there is a focus on regulation requirements, the wellbeing for all those involved cannot be overlooked. This course explores the fundamentals of mental wellbeing and provides evidence based tips proven to improve mental health. The content also provides an opportunity for self-reflection and practical ways to apply some of the ideas into your personal and professional life.

Presented by Glenn Baird, Head of Mental Health

CPD Hours	1 hour
FASEA CPD Area	Client Care and Practice

LAUNCH

Referral Techniques

How do you protect and grow your revenue streams from referrals? This course offers real examples of referral techniques from your peers. By leveraging your existing client base or using centres of influence, we'll demonstrate the ways your peers have been successful by becoming highly referable.

Presented by Tony Vidler, Business Adviser and Sales Training Coach

1 hour

CPD Hours	1 hour
FASEA CPD Area	General

LAUNCH

Search Engine Optimisation

This course will teach you how to implement tactics to help grow your online presence and reputation, ensure people find you online, distinguish your website from the competition and improve your search ranking. Whether you outsource or manage your website yourself, this course can help you build an online presence that stands out.

Presented by Ken Wong, Senior Manager, Digital Intelligence

1 hour

CPD Hours	1 hour
FASEA CPD Area	General

LAUNCH

The five soft skills you must have to be here in five years

Tony Vidler shares the soft skills to be successful with advice now and in to the future. Using examples and ways to develop these skills, this practical course provides skill training beneficial for all advisers.

Presented by Tony Vidler, Business Adviser and Sales Training Coach

1 hour

CPD Hours	1 hour
FASEA CPD Area	Client Care and Practice

LAUNCH

Website Fundamentals

1 hour

Website Fundamentals is an introductory course explaining why a digital presence is important and the value it can bring to your client engagement activities. Learn about the digital environment and new trends in website development. We'll also show you the key features of a website that can help you deliver on your bottom line. If you don't have a website or think your website is under-performing, this course is for you.

Presented by Ken Wong, Senior Manager, Digital Intelligence

CPD Hours	1 hour
FASEA CPD Area	General

LAUNCH

NEW COURSE

Why Millennials and Technology are the Future of Your Business

1 hour

Finding the best graduate talent and then developing them into valuable long-term contributors to the industry remains a constant challenge for the financial services industry. In this session, you will hear from Alisdair Barr on what millennials are looking for in engaging with a practice of the future.

You will also experience the Striver platform and how you can easily create a highly engaging and attractive role in your business and identify talent immediately that may suit the opportunity you have.

Presented by Alisdair Barr, Founder and Managing Director, Grad Mentor

CPD Hours	1 hour
FASEA CPD Area	Client Care and Practice

LAUNCH

Meet TAL's educators

David Glen

National Technical Manager, TAL

David's responsible for providing advice on the tax treatment of TAL products. He also leads the development and delivery of technical content for advisers.

With over 20 years' experience providing tax and strategic advice to the financial services industry in Australia and Asia, David is well equipped to work closely with advisers to formulate effective client solutions.

David's worked as a tax partner at a large accounting firm and more recently was tax counsel for several insurance companies. David is a qualified solicitor, Chartered Accountant and holds a post graduate diploma in taxation law.

Scott Hoger

National Technical Manager, TAL

Scott joined TAL in 2013 and has over 15 years' experience in financial services. At TAL, Scott's responsible for providing strategic advice solutions to advisers and licensees.

Scott has a strong technical knowledge base, having worked as a financial adviser and business development manager in a number of large banking institutions and insurance companies. He's also run his own financial planning business, specialising in personal and business insurance.

Dr Sally Phillips

General Manager, Health Services, TAL

Sally joined TAL in April 2016 as General Manager, Health Services after 7 years at Macquarie Life where she was responsible for managing the underwriting and claims teams as well as leading the insurance proposition.

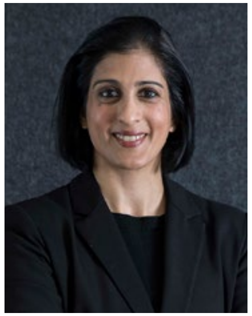
Sally has a background as a medical doctor and has spent nearly 20 years in the Australian, South African and UK Insurance industry working in strategic leadership positions covering product design, marketing, sales and distribution roles. She has extensive experience in product, claims and underwriting, and in particular the ability to review these functions from a customer perspective as well as a business point of view.

Sally is passionate about challenging the norm, and is always looking for innovative ways to empower customers to live their best life through good health. Her role managing the Health Services team at TAL allows her to view health holistically and add value across each of the three key health pillars – physical, mental and financial. Sally's focus is to ensure that strategically health is at the core of the TAL business and embedded across the entire customer journey.

"Absolutely fantastic! Thank you to the entire TAL team, particularly David and Scott for their expertise."

– Risk Academy student

> "Speakers were excellent and knew their information. I would recommend others attend."
>
> **– Risk Academy student**



Dr Priya Chagan

Chief Medical Officer, Head of Physical Health in the Health Services Team

Priya completed her medical training in South Africa and then specialised in travel medicine and occupational health, followed by MBA studies. Her experience includes roles in clinical practice and disability assessment in the UK and Europe and many years developing occupational health programs in Africa, namely Rwanda and South Africa. Priya joined the insurance industry as Chief Medical Officer of Group Insurance for a South African insurer.

Priya joined TAL in October 2016 and is involved in providing medical training across the business, as well as ensuring consistent medical opinion in underwriting and claims through the use of evidence-based practice.

Jo Hetherington

Head of Health Claims and Underwriting, Financial Risk, TAL

Jo Hetherington joined TAL in 2011 and has over 20 years' experience in forensic accounting.

A Chartered Accountant, Jo worked at one of the 'Big 4' accounting firms for 10 years. During this time, she acted as an expert witness, quantified economic losses for personal injury cases and was involved in commercial litigation matters.

Nerida Cook

Team Leader, Claims, TAL

Nerida joined TAL Retail Claims in 2012, providing high quality claims outcomes for TAL clients. Nerida has experience as a Senior Case Manager, Technical Specialist and now Team Manager, and has always been driven by her passion for helping clients in a difficult time.

Nerida is an expert in Income Protection claims, and due to her excellent work in assisting and educating clients at the start of the claims experience, she was awarded the 2018 Annual CEO Award and Dai-Ichi Life Special President's Award.

Jason Bamford

National Sales Development Manager, TAL

Jason Bamford joined TAL in 2007 and has over 15 years' experience in financial services. Initially specialising in product development, Jason moved into TAL's Sales team in 2010 where he works closely with product and marketing to identify opportunities to improve the adviser experience.

Daniel Devine

Principal Underwriter, TAL

Daniel's underwriting experience includes roles in the general and life insurance industries both in Australia and overseas. He worked for major organisations in the insurance industry before joining TAL's underwriting team 10 years ago.

Daniel is a member of the TAL Technical Underwriting team, helping mentor and coach underwriters as well as complex case management and assessment.

Glenn Baird

Head of Mental Health, TAL

Glenn Baird leads TAL's mental health strategy working with internal stakeholders and mental health groups to encourage the health and wellbeing of TAL's people, its customers and of all Australians.

A qualified psychotherapist, facilitator and trainer with over 14 years' experience, Glenn has mainly worked with suicidal clients from diverse backgrounds – including professional athletes, corporate lawyers and tradespeople.

Glenn's passion for high performance sports, combined with experience playing basketball at the elite and semi-elite levels for 15 years, has enabled him to help individuals and teams focus on continual improvement.

He has designed and implemented award-winning workplace education and support programs promoting health and wellbeing.

Robert Powell

Senior Product Manager, TAL

Robert joined TAL in 2014 following a seven year tenure at Allianz Life which included responsibilities relating to product management, underwriting, claims and distribution.

At TAL, Robert commenced in the direct business before moving into the retail channel in 2015, taking responsibility for the on sale product offer in 2017. Robert holds degrees in biological science and risk management, providing a broad experience base to complement his career in product management.

Robert enjoys the diversity of product management and the opportunity this provides to make a meaningful difference to people when they experience a life changing event.

"Great presenters. Very informative and knowledge."

– Risk Academy student

Meet all our on-demand presenters here

Meet our guest presenters

Tony Vidler

Business Adviser and Sales Training Coach, Strictly Business

Tony has over 30 years' experience in financial services as an adviser, advisory firm managing partner, professional association leader, director and governance expert, and institutional general manager. His expertise specifically focuses improving distribution performance and building better businesses.

Focused on real world ways to improve prospecting and marketing, business systems and bottom line results, Tony's philosophy is "practical professionalism" with emphasis on the practical.

Blending the experience of traditional prospecting and marketing methods with today's technology and opportunities – and working out how to apply them to get more business – is the key theme in Tony's presentations.

Rob Jones

Director, Pelaton Partners

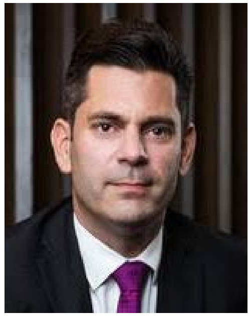
Rob is a co-founder of Pelaton Partners, a business that uses his practical experience to advise financial planning businesses on growth strategies, primarily around sustainable pricing models linked to clear defensible client value propositions.

In his (much) younger days Rob was a Detective in the Victorian police force and was commended for courage. He brings this firm resolve and fearless approach to his business life.

Rob forged his own highly successful financial services consultancy. He was a Director and part-owner of The Money Managers Ltd, becoming General Manager (5 years) and CEO (3 years).

As CEO, Rob led a team of 53 staff in six locations and ultimately merged the Money Managers with Shadforth Financial Group. Rob continued with Shadforth in the area of merger and acquisitions as well as implementing a national transition strategy for advisers and clients across the group. In 2012 he left Shadforth to establish Peloton Partners.

He's been described as "liking the facts" – something he happily concurs with.

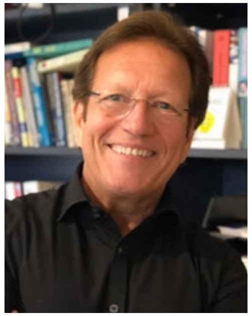


Alisdair Barr

Founder and Managing Director, Grad Mentor

Alisdair Barr is the Founder and Managing Director of Grad Mentor, who's sole purpose is to raise awareness of Financial Planning in small to medium firms as an exciting and rewarding career path to ensure the future of the profession. Grad Mentor interviews hundreds of university graduates each year and works with new entrants to prepare them for their careers. Most of the graduates end up working in small to medium Financial Planning and Accounting businesses, so through this process and experience many lessons have been learnt.

This has led to the development of a digital platform called Striver which is aimed at creating meaningful connections that lead to lasting business relationships. With the vision to create trusted and inspiring community experiences. Where students and businesses easily discover each other, engage meaningfully and grow together.



David Penglase

Author and Behavioural Scientist

David Penglase is a behavioural scientist, award-winning international conference speaker and best-selling author, inducted into the Australian Professional Speakers' Hall of Fame.

For over 25 years, David has been helping top tier corporations and associations develop aspirational leadership, increase sales, improve customer experiences, and enhance employee engagement.

David shares his research, evidence-based strategies and tips on how trust impacts almost every element of success in our professional and personal lives.

David has degrees in business and human resource development, an MBA, a Master's degree in Professional Ethics, and a Master of Science degree in Applied Positive Psychology.

"Great job! Presenters were energetic and enthusiastic."

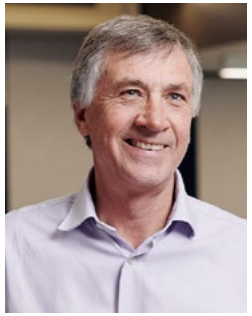
– Risk Academy student

Joanna Matthew

Head of Education at Financial Planning Association of Australia

Joanna has a broad range of experience from human resources to corporate services and business management, and in her previous role as Executive Director of the New Zealand Library Association oversaw the provision of their professional designation and education programs. Her experience provides her with the insights and skillset to provide industry compliant educational support for advisers, which is relevant to key areas of their businesses.

Joanna has been with the Financial Planning Association of Australia as the Head of Member Services and Head of Education for just over a year, working closely with advisers to help them meet the new industry requirements and support them as the industry continues to evolve.



Marc Olynyc

Senior Lecturer in Financial Planning and Superannuation, Deakin University

Marc Olynyk is a Senior Lecturer in Financial Planning and Director of Financial Planning at Deakin Business School. Marc has significant experience within both academia and industry in the areas of financial planning, superannuation and retirement planning and accounting. He has been an Authorised Representative for over 15 years and has more than 20 years of experience as one of Australia's leading academics and educators in the financial planning discipline where he has played a key role in the development, growth and recognition of financial planning within both the university sector and the financial planning profession.

Marc is a founding committee member of the Financial Planning Education Council (FPEC), is a regular contributor and reviewer of education programs within the professions and is a co-author of one of Australia's leading textbooks in financial planning. Marc is a Fellow of the Chartered Accountants of Australia and New Zealand and a member of the Financial Planning Association. He plays a key role in facilitating industry engagement, developing business partnerships and strengthening the ties between the university sector and industry. Marc has published a number of articles in the areas of financial planning, superannuation and financial literacy.

More info

To learn more, please contact your local BDM or the Risk Academy Support team on **1800 748 682** (Monday – Friday, 9am – 5pm AEST) or visit **adviser.tal.com.au/risk-academy**

NSW/ACT

Level 16, 363 George Street
Sydney NSW 2000

nswretaillife@tal.com.au

(02) 9448 9000

VIC/TAS

Level 6, 390 La Trobe Street
Melbourne VIC 3000

vicretaillife@tal.com.au

(03) 9284 9207

QLD

Central Plaza 1,
Level 14, 345 Queens Street,
Brisbane QLD 4000

qldretaillife@tal.com.au

(07) 3243 1200

WA

Level 1, 5 Mill Street
Perth WA 6000

waretaillife@tal.com.au

(08) 6380 4400

SA/NT

200 Greenhill Road
Eastwood SA 5063

saretaillife@tal.com.au

(08) 8113 8300

TAL Life Limited
GPO Box 5380 Sydney NSW 2001
ABN 70 050 109 450 | AFSL 237848
www.tal.com.au
TALR7981 / 0120

TAL / Risk Academy