

Virtual Insurance Roadshow

Thursday, 1 June 2023

Time	Description
10 mins before	<p>Arrival, technology check and welcome Each webinar has its own attendance link which you will receive in the calendar invite upon registration for a webinar. Full attendance and quiz/polling question completion is required for each webinar to receive CPD.</p>
Session 1 AWST 9:00am ACST 10:30am AEST 11:00am	<p>Buy/Sell Purpose Cover, ClearView – Alex Koodrin There are a number of issues to consider in arranging buy/sell purpose cover for a business. Financial advisers, who generally manage this process, need to ensure that their clients get professional and specialised legal and taxation advice to help implement the correct legal documentation that reflects an appropriate ownership structure. This ensures a smooth and orderly process for the transfer of business equity should a trigger event occur. In this session we will look at buy/sell agreements and relevant trigger events and their funding via life insurance as well as business valuation methods, tax treatment of insurance proceeds and policy ownership options. Includes a case study. Estimated CPD areas: Technical Competence Registration Link: https://attendee.gotowebinar.com/register/58678068243336792</p>
30 mins	Break
Session 2 AWST 10:15am ACST 11:45am AEST 12:15pm	<p>Managing Insurance Costs in an Inflationary Environment, MetLife – Dr Jeffrey Scott With inflation now hitting historic highs, Australians are under increasing pressure to meet and manage household expenses. As a result, many Australians will be under pressure to maintain their life insurance. The most obvious solution available is to either cancel cover or simply reduce the sum insured. This presentation will explore a variety of other options and strategies available to you and clients to achieve insurance outcomes fit for purpose while recognising financial pressures in the high inflation environment. Estimated CPD areas: Technical Competence Registration Link: https://attendee.gotowebinar.com/register/8254337686127640414</p>
30 mins	Break
Session 3 AWST 11:30am ACST 1:00pm AEST 1:30pm	<p>Risk Profiling for Insurance Advice, MLC Life – Marshall Ross Personal risk appetite is highly individual and will be a major influence on the types of and amounts of insurance that will be appropriate for any given client. Risk Profiling has become commonplace in the assessment of investment asset allocation, however, in this session we delve into methods to help advisers pinpoint this for their clients to deliver tailored risk mitigation solutions using a similar framework. Estimated CPD areas: Technical Competence Registration Link: https://attendee.gotowebinar.com/register/1663646186424389205</p>
30 mins	Break
Session 4 AWST 12:45pm ACST 2:15pm AEST 2:45pm	<p>Switching Gears – Income Protection Advice Considerations, TAL – David Glen In a world where new generation income protection products are less generous than in the past, how do financial advisers recommend altering or replacing existing contracts and still act in the client's best interest? This interactive session will discuss what is driving alteration/replacement conversations, then focus on how to compliantly make a recommendation to the client. We will focus on informed consent, providing financial advisers with the tools to put the client in a position of power when considering product trade-offs, which is ultimately what must be done in the advice process. This presentation has been designed for all levels of risk knowledge and experience. Estimated CPD areas: Technical Competence, Professionalism & Ethics Registration Link: https://attendee.gotowebinar.com/register/2205609761406381398</p>
AWST 1:30pm ACST 3:00pm AEST 3:30pm	Close