Course Name: Winning Relationships

Overview of Course

The Winning Relationships program aims to provide participants with the skills, processes and tools to attract and retain outstanding client relationships.

Learning Outcomes

At the end of the course you will be able to:

- Establish Rapport and build the foundations of winning relationships
- Understand the clients needs through questioning, probing, listening and relating
- Educate the client in the financial planning process and the importance of the long term relationship with the Adviser
- Educate the client in identifying their risk tolerance and the important role this plays defining their life cycles
- Maintain a professional presentation during the interview process with the client.

Features and Benefits

- Following the training program, an ongoing coaching program is available for each individual adviser.
- The workshop enables improvement by video taping client interviews, critique from our coaches and self assessment by participants
- Proven return on investment and improvement in business results.

Audience

The course is available for Financial Advisers or anyone who is interested in a financial planning role.

Pre Requisites

This course requires participants to be working within the Financial Planning Industry.

Course Material

A manual with reference guides will be provided to the participants and post training feedback pack.

How to register

Send an e-mail to info@iq-eq.com.au or contact us on 1300 799 994.

Investment

Please contact iQ:eQ for program rates.