



This course provides:

3 Life & 3 A&S CE credits for all Provinces except AB & QC.

AB will Receive 3 Life CE Credit & 1 A&S CE Credit.

QC will receive no CE credits.

What will the Financial Advisor learn by taking this course?

While there is much financial advisors cannot control about their professional trajectory now, there are some important points to focus on to stay on track.

Your clients are worried about how the impact of the current COVID-19 pandemic will have on their family's safety as well as personal and business finances. Financial emergencies can be stressful and cause considerable hardships for them and their families.

Financial emergencies can happen to anyone and they can happen at any time. They can be the result of family illness, job loss, urgent home repairs, or a weather event like a major flood. Some events could even shut down communities for an extended period.

They can control their thoughts, emotions, and your reactions. By understanding that they have control over how they interact with you, they can help themselves become more resilient during a challenging or uncertain time.

You the advisor may or may not be aware, but you have coping mechanisms in place that will help you manage your clients and prospects stressful situations.

Communication becomes paramount. In times like these, there is no such thing as over-communication.

Clients want human interaction in this time of social isolation, and they need to have their advisors communicate with them.

Traditional financial and investment planning has "gone out the window."

They need to hear from you!

This course will provide some reasons to contact your clients during these unprecedented times and provide the service and support that they are looking for.

This course covers:

- Communicating and financial relationship building with clients.
- Ideas to allow the advisor to speak with their clients and provide updated information during an emergency situation that could lead to possible sales.
- Tips for the advisor to get back to basics & it's all about providing service.
- A review of the clients financial & estate planning process including goals, through suggestions, providing advice and the use of questions.
- Tips on what the advisor can do during these challenging times for their clients & prospects.
- Advising your clients on how to get through a financial emergency & the importance of having and setting up an emergency fund.
- A financial review of Life, Critical Illness, Disability & Business Insurance.
- Tax repercussions and ideas that you can provide to protect your client's financial & estate plan that are currently in place.
- A review of the Federal Governments assistance programs during COVID-19, and how it will benefit the client and possible lead to more sales.
- A review of financial fraud and COVID-19 that can be discussed with your clients and prospects.