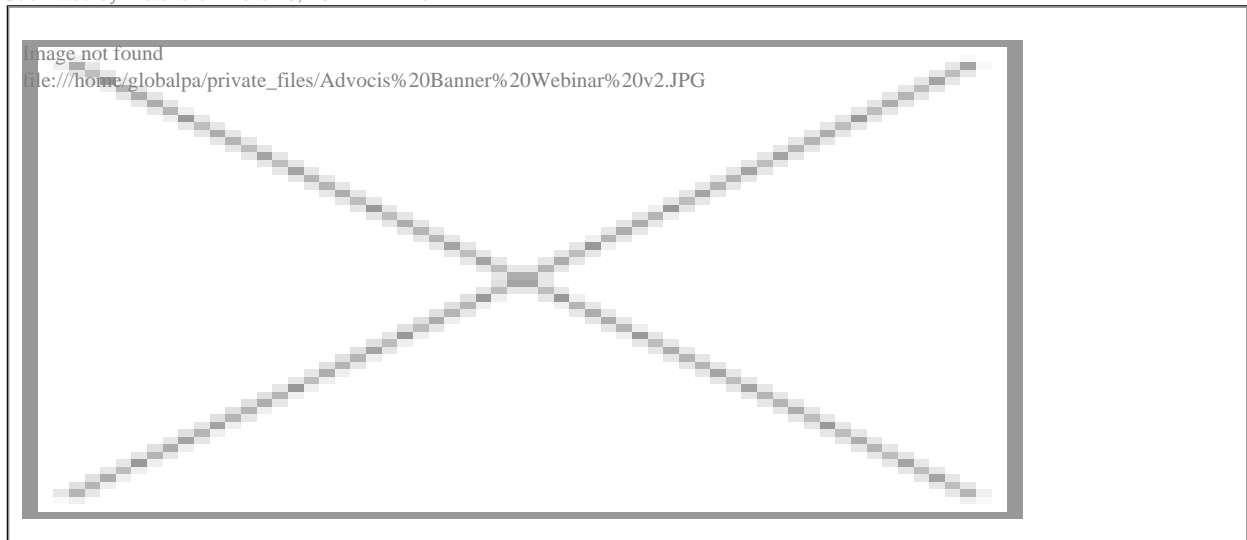




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Advocis Greater Vancouver Presents Practice Development Series Module #6B: Analysis (Mentor Input)

Submitted by Victoria on March 9, 2021 - 11:12am



Practice Development Series

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to provide additional guidance and support to participants, and to advise on how to facilitate the workshops and mentor the participants.

This Webinar is Complimentary to both Members and Non-members

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Module Six: Analysis

The initial interview and fact finding process will uncover a client's financial goals and priorities. The analysis and recommendation will differentiate you from other advisors in the marketplace. In this module, you will learn how to:

- Prepare a financial plan and analysis
- Identify opportunities to improve a client's financial situation
- Prepare recommendations to address a client's needs.
- Give full and adequate disclosure of all assumptions made in the analysis
- Be aware of the life insurance policy replacement rules when making changes to current coverage.

*Module Six has been approved by The Institute for 3.0 CE credits.

Development Series Includes:

Source URL: <https://www.gpts.ca/bulletins/advocis/2021-03-09/advocis-greater-vancouver-presents-practice-development-series-module-6b-analysis-mentor-input>

- **Module 1A:** Business Planning: September 15, 2020
- **Module 1B:** Business Planning/Mentor Input: September 22, 2020
- **Module 2A:** Marketing: October 6, 2020
- **Module 2B:** Marketing/Mentor Input: October 20, 2020
- **Module 3A:** Prospecting: November 17, 2020
- **Module 3B:** Prospecting/Mentor Input: November 24, 2020

Modules 4-6: Hosted by Advocis Greater Vancouver:

- **Module 4A:** Preparation: January 12, 2020
- **Module 4B:** Preparation/Mentor Input: January 19, 2021
- **Module 5A:** Client Engagement: February 9, 2021
- **Module 5B:** Client Engagement/Mentor Input: February 23, 2021
- **Module 6A:** Analysis: March 9, 2021
- **Module 6B: Analysis /Mentor Input: March 16, 2021**

Modules 7-9: Hosted by Advocis Greater Kootenay:

- **Module 7A:** Client Engagement: April 13, 2021
- **Module 7B:** Client Engagement/Mentor Input: April 20, 2021
- **Module 8A:** Business Management: May 11, 2020
- **Module 8B:** Business Management/Mentor Input: May 11, 2021
- **Module 9A:** Practice Management: June 8, 2021
- **Module 9B:** Practice Management/Mentor Input: June 15, 2021

Modules 10-12: Hosted by Advocis Greater Thompson Okanagan:

- **Module 10A:** Marketing Your Practice: September 14, 2021