TRAINING

CPD CERTIFIED
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CISI CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT ENDORSED CPD

# Increased Customer Centricity - the Impact of Consumer Duty

## Training advisors on how to discuss with clients their values, motivation, ambitions, and goals; creating a sustainable wealth strategy

## THE NEED FOR THIS TRAINING IS DRIVEN BY:

**Consumer Duty regulations** for financial services firms to put the needs and expectations of clients central to the relationship with them - addressing consumer needs, understanding and expectations.

**Client demand** for purpose driven services from their wealth advisors – this being led by HNW GEN Z, Millennials, Women of Wealth; and, as recent research indicates, older generations.

**To be customer centric** it is essential for private client wealth advisors to be equipped to talk to their clients about their values, motivation, ambitions, and goals as part of the implementation of sustainable investment strategy, including priority and goal setting leading to an investment portfolio.

**This CPD Certified and CISI Endorsed** course takes advisors step by step through a process your firm and advisors can adopt to improve your approach to client suitability, the critical component in your firm's ability to meet the Consumer Duty's two outcomes on customer support and consumer understanding.

## WHY ATTEND THIS COURSE

**In this live, interactive, tutor led training course, we take you through how you can:**

- Update your current approach to a values based customer centric training aligned with the *Consumer Duty*.
- Learn *best practice approaches* to improve how you can address ESG client preferences.
- Apply approaches for private client wealth managers that may be used to *evidence a clearer and higher standard of care* to the regulator, while meeting client needs and expectations.
- Achieve *genuine competitive advantage* in client experience.
- *Improve client engagement* while enhancing your reputation.
- Leverage Consumer Duty as a catalyst for commercial growth based on growing a *values based purpose driven wealth management business*.

**There is a need for highly specialised training...**

**...And our customer centric suitability training course is designed to deliver just that.**

## BOOK NOW TO OPEN THE DOOR TO NEW COMMERCIAL OPPORTUNITIES

To learn about our online CPD Certified and CISI Endorsed training contact:

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**DISCOUNTS AVAILABLE FOR PHILANTHROPY IMPACT PARTNERS**

## LEARN WITH

As an organisation at the intersection between ESG and impact investment, social investment and philanthropy our mission is to increase the flow of capital for good by enabling private clients and their families to match their purpose driven wealth strategies with their values, capturing their sustainable, social and ESG/Impact investment and philanthropy preferences across the spectrum of capital.

**This course is intended for wealth and finance advisors as well as lawyers and other professional advisors with an interest in values based client centric issues and ESG/impact investing**