The Insurance Institute of **London** PFS | CII

Continuing Professional Development Certificate

The value of an adviser – how an IFA can make a difference - Protection

Date: Wednesday 21 November 2018

Time: 1.15pm - 2.00pm

Speaker: Dan Atkinson FPFS MCSI APP Head of Technical | Chartered Financial Planner EQ Investors

Dan explained the importance of protection in financial planning and the role of the financial planner.

When we plan for the future we often think about what might go ‘right’. However, what happens when things don’t go to plan? Then there are some things that we can’t ‘adjust’ to that have a big impact on our clients’ financial plans. Aside from the impact on family life, events such as disability, illness, or death can have financial ramifications. Planners are key to helping clients identify the potential consequences

By the end of this lecture members would have gained an insight into:
- The impact of disability, illness and death on financial plans.
- The tools we have to reduce or mitigate the impact of these risks.
- How financial protection is a key part of a robust financial plan.

CPD CII Scheme | 3/4 Hour

This lecture or podcast can be included as part of your CPD requirement should you consider it relevant to your professional development needs. It is recommended that you keep any evidence of the CPD activity you have completed and upload copies to the recording tool as the CII may ask to see this if your record is selected for review.

CII CPD event accredited - demonstrates the quality of an event and that it meets CII member CPD scheme requirements.