



The Insurance
Institute of London
Chartered Insurance Institute

Continuing Professional Development Certificate

The evolving client

Date: Wednesday 27 February 2019

Time: 1.10pm - 1.55pm

Speaker: Rose St Louis, Head of Strategic Partnerships, Zurich

In this IIL Financial Services lecture Rose explored the changing client landscape, focusing on 3 segments and their need for sound financial planning with a focus on protection advice.

By the end of this lecture, members would have gained an insight into the:

- ever-changing client landscape
- main influences affecting clients' financial planning requirements
- protection opportunities within specific client segments



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.