



The Insurance  
Institute of London  
Chartered Insurance Institute

# Continuing Professional Development Certificate

## Maximising introducer relationships for Financial Advisers and Wealth Managers

**Date** Thursday 18 February 2021

**Time** 1.00pm - 2.00pm

**Speaker** David Hazelton, Practice Intelligence Manager, Raymond James

In this IIL financial services webinar for financial advisers and wealth managers, David Hazelton discussed how to develop potential Centres of Influence (COI), opening the referral door and moving a referral relationship from affiliate to strategic partner status. David also outlined a proven process for maximising introducer relationships with practical steps for the audience to take away and action.

**By the end of this webinar members would have gained an insight into:**

- Defining an ideal Centre of Influence / referral relationship
- How to identify and approach potential COIs
- Practical ways to maximise the value of your introducer relationships



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

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