



The Insurance
Institute of London
Chartered Insurance Institute

Continuing Professional Development Certificate

Reframing emotional clients

Date Tuesday 27 April 2021

Time 1.00pm - 2.00pm

Speakers Joanna Grandfield, Partner, Mills & Reeve and Marcie Shaoul, Director, Rolling Stone Coaching

In this IIL financial services webinar, Joanna Grandfield and Marcie Shaoul demonstrated ways to understand what stops emotional clients from moving forward and how to enable professional advisors to help them so that the client is in a position to make clear, well-thought-out decisions about their finances.

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

- Identifying when clients are in a fight, flight, freeze mode. Tell-tale signs and what to look for
- Understanding how that will prevent them from moving forward
- Understanding and identifying the impact of those behaviours on what they are trying to achieve with you
- Being able to start unpicking and unblocking those behaviours using tools learned in the webinar



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