The Certificate IV in Life Insurance (FNS41515) is for those who already work or want to work in the life insurance industry.

The Sales stream has been developed as an introduction to sales and service roles. It includes an introduction to legislation, life insurance products and services, risk, claims and the skills to work well with clients. For more information please visit our website.

www.kaplanprofessional.edu.au
The Sales stream focuses on sales skills including the processing of life insurance applications, business to business sales, retail sales, cross-selling and the implementation of a sales plan. Following this course, students who want to progress to giving financial advice to retail clients will need to enrol in Tier 1 Life Insurance.

LEARNING OUTCOMES

- Apply legislation, regulation and workplace procedures to a life insurance job role
- Identify life insurance products and services and who they are suitable for
- Understand the concepts of life risk, underwriting and claims
- Understand how selling varies with the application, policy and type of client
- Understand the range of selling models, cross-selling and why selling to retail clients is regulated by financial advice legislation
- Respond to client enquiries with client relationship management skills
- Present a positive perception and adapt to a diversity of clients
- Understand continuous improvement, dispute resolution and complaint management

TOPICS COVERED

Topic 1: Life insurance and the financial services industry
Topic 2: Life insurance products and services
Topic 3: Work well with clients
Topic 4: Life insurance risk
Topic 5: Life insurance sales
Topic 6: Life insurance claims

Enrolment Date
Start anytime.

Entry Requirements
There are no entry requirements for this course.

Exemptions
Exemptions may be granted on the basis of previous study and/or experience.

Duration
12 weeks. Students are given a maximum time of 12 months to complete the qualification from their initial enrolment date.

Delivery
Online: self-study access to a virtual classroom

Assessment
One (1) exam and one (1) assignment.

Fees
For an updated schedule of fees please visit our website.

“...gained knowledge and experience, a broader understanding of my industry, and the qualifications I needed to move into the role I wanted. At the moment, it is also providing me with tools to become even more effective in my current role, while building me up for future roles.”

Daniel Bofinger
Our reputation is built on the quality of our programs, the flexibility of delivery options and our rigour of approach to assessment and industry education standards.

Kaplan Professional offers vocational and postgraduate education, providing pathways from certificate level all the way to masters degrees. At Kaplan we believe in a global vision by supporting and building an environment of success through our core values of: integrity, knowledge, support, opportunity and results. We focus on creating long-term training and education partnerships with individuals and organisations. Our learning solutions range from ASIC compliance programs to professional qualifications and CPD.

**OUR HISTORY**

- **1966** Founded the Securities Institute of Australia (SIA).
- **1990** Introduced the Graduate Diploma of Applied Finance and Investment targeting industry participants.
- **1999** Introduced Master of Applied Finance, a revolutionary degree and the first industry specific provider in Australia.
- **2005** Securities Institute of Australia merges with the Australian Institute of Banking and Finance to become the Financial Services Institute of Australasia (FINSIA).
- **2006** Kaplan enters the Australian market and acquires highly successful and established vocational education business, Tribeca.
- **2007** Kaplan acquires the education division of FINSIA.
- **Present** Today we build on the tradition of quality education designed specifically for the industry and harness the global reach of Kaplan.
Kaplan Professional is one of the leading providers of professional education and training in Australia, servicing over 50,000 advisers, responsible managers, lenders and customer service staff annually.