

Subject overview

This subject enables you to craft a truly exceptional, targeted client experience using consumer research. Design your client advice experience to meet the changing needs of Australians, focussing on areas that research finds are valued most. Build exceptional adviser performance in communication and emotional intelligence.

Learning outcomes

On successful completion of this subject, you should be able to:

1. Create a client engagement strategy to maintain & attract more ideal clients.

Subject snapshot

The table below provides a quick overview of this subject. It lists each topic and identifies when assessment items occur. This snapshot is a useful tool for developing a study plan.

Week(s)	Topic name
1 -2	Topic 1: Risk Management: A Client – centric Approach
3 -4	Topic 2: Risk Strategies
5-6	Topic 3: The Value of Protection
7-8	Topic 4: The Art of Estate Planning
9-12	Assignment (Weighting 100%)
Total hours: 120	

Subject assessment

Assessment	Description	Week	Topics	Weighting	Subject Learning outcomes assessed
Assignment	Advice Strategy Paper	Week 12	1–4	100%	LO1