SCOTTISH WIDOWS

Protecting the assets of high net worth clients – webinar

17th October

As an industry we're good at supporting high net worth clients in accumulating wealth pre-retirement and managing it post-retirement, but how good are we at protecting that wealth? Join us for an exclusive session as Rose St Louis, Scottish Widows Director of Protection, and guest speaker Roy Mcloughlin, Protection Distribution Group, discuss how different Protection solutions can complement pensions and investments to help you deliver good outcomes for these clients.

Register Now

During the webinar, Rose and Roy will delve into the intricacies of different protection products, highlighting their essential role in pre and post retirement planning. They will discuss how to effectively communicate the benefits to your clients, ensuring their financial stability. Our speakers will share valuable insights, expertise, and best practices, enabling you to expand your advisory portfolio, helping strengthen your relationships with your clients and potentially opening up additional business opportunities for you. We will also bring this topic to life with real life examples and case studies.

By the end of the session, you will be able to:

Explain the fundamentals of different protection products and their significance pe and post retirement

Identify potential risks and financial gaps in client portfolios

Understand effective techniques for discussing protecting

As with all of our webinars, there will be an opportunity for you to ask questions directly to our speakers.

This webinar will qualify for up to 60 minutes of CPD towards the CII / Personal Finance Society member CPD scheme. You will receive a link to the CPD certificate in the playback email shortly after the webinar.