THE Knowledge PROGRAM

Technical and market-based learning to apply in your day-to-day business

This program aims to give you the belief and conviction to engage in complex insurance planning. The result is exceptional advice for your clients and business growth for you.

The Knowledge Program from PPI delivers technical know-how and sales confidence. Our courses supply you with tangible sales ideas that you can immediately apply in your practice. The sessions incorporate multi-media presentations, interactive classroom discussions and a variety of review material for your ongoing reference, and are eligible for Continuing Education credits.

COURSE 1:
THE BUSINESS INSURANCE MARKET

- Corporate Structures and Taxation
- Life Insurance Taxation
- Shareholder Agreements
- Corporate Owned Insurance
- Sales Ideas and Case Studies

COURSE 2:
EXCELLING IN THE FAMILY MARKET

- Beneficiary Designations
- Estate and Will Planning
- Power of Attorney and Health Care Directive
- Planning With Trusts
- Sales Ideas and Case Studies

COURSE 3:
MANAGING YOUR COMPLIANT PRACTICE

- Compliance 101 – *including* Licensing, Conflicts of Interest, Disclosure, Privacy, Referral Arrangements, Client Files, Holding Out, and more
- Needs Based Selling
- Anti-Money Laundering and Anti-Terrorist Financing
- Sales Ideas, Case Studies and client-friendly Document Samples

COURSE 4:
BUYING AND SELLING A PRACTICE

- Business Transition – Objectives and Considerations
- The PPI Business Marketplace: *MatchBook, powered by FindBob*
- Valuation and Financing Options
- Case Studies – Finding the Win-Win
- Resources and articles

COURSE 5:
LIVING BENEFITS – THE BASICS

- Identifying the Opportunity
- Understanding DI, CI and LTC
- Making a Claim
- Handy checklists and articles

Contact your local PPI office today to find out how you can be enlightened and enriched by The Knowledge Program.

Visit www.ppi.ca to find an office near you.

PPI

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