



GET THE MOST FROM YOUR PROFESSIONAL YEAR

Market-leading courses and our new PY Manager platform: supporting candidates, supervisors and licensees right through the Professional Year

TAL

LAUNCH YOUR PY WITH A TRUSTED PARTNER

TAL Risk Academy is here to support your individual education needs: whether you're completing your Professional Year or supervising a new entrant, there are courses available to suit you.

You can also gain real-world insight through our growing PY Community. Attend virtual events to learn from industry experts and leading advisers, and take the opportunity to network as well.

And, through our new PY Manager platform, we're here to help you keep track of all your PY details, courses and progress, all in one place.



TAL RISK ACADEMY'S PY COURSES

We offer four specially created PY courses, designed to help candidates build their knowledge, gain key skills and get the right start for a rewarding career in advice.



Financial Adviser Exam Preparation

This masterclass covers all the Financial Adviser Exam areas and gives you the opportunity to take a practice test so you can approach the exam with confidence.



Client Conversations Workshop

Learn how to better understand a client's situation, their challenges and aspirations so your advice can be positioned in the most valuable way.



Ethical Dilemmas Workshop

Explore real client scenarios and develop knowledge about some of the ethical dilemmas faced by advisers and how to deal with them.



Risk Advice and Strategy Workshop

Gain skills for providing risk advice, with a series of case studies that demonstrate how to identify the right level of cover and explain the value of life insurance to clients.

INTRODUCING PY MANAGER

Our new PY Manager platform makes it easy for candidates, supervisors and licensees to keep track of all the things that make up a great Professional Year.

Through one digital hub, you can review and manage your PY requirements, details and achievements. PY Manager means everyone has a clear picture of progress and what's ahead.

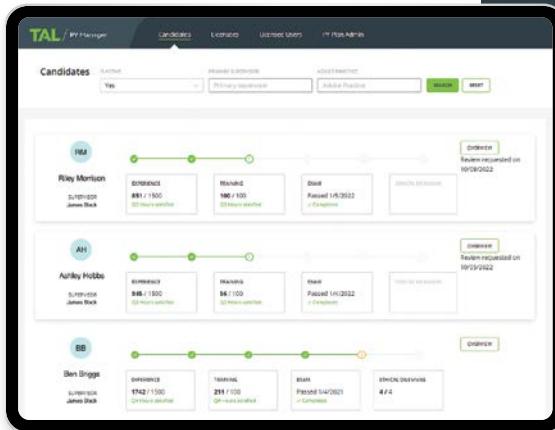
Candidates can track their work hours, create learning plans with industry-aligned courses and join PY Manager at any quarter during the year.

Supervisors can quickly access a full overview of hours and activity, and sort those by type, regulation area and more.

And **licensees** have a full picture of their candidates and supervisors, with easy-to-use requirements tracking.



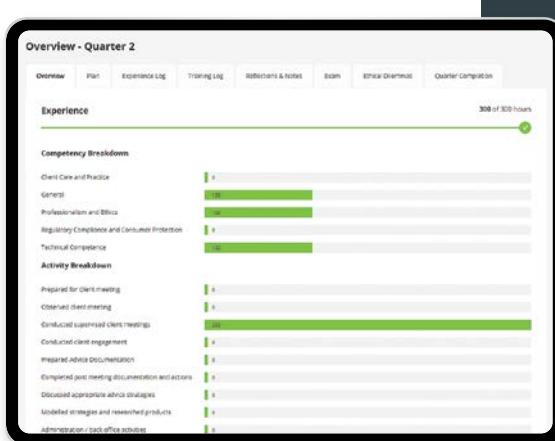
SAVE TIME WITH ALL
YOUR PY INFORMATION
IN ONE SPOT



The screenshot shows the PY Manager interface for three candidates: Riley Morrison, Ashley Hobbs, and Ben Briggs. Each candidate's profile includes a progress bar, hours worked, and a 'PY Status' section. Riley Morrison is at 88% of 1500 hours, Ashley Hobbs is at 96% of 1500 hours, and Ben Briggs is at 74% of 1500 hours. The 'PY Status' section shows 'Passed 1/5/2022' for Riley and Ashley, and 'Passed 5/4/2022' for Ben.



EASILY TRACK
PROGRESS WITH A
COMPLETE PICTURE
OF PY ACTIVITY



The screenshot shows the PY Manager interface for an overview of Quarter 2. The 'Experience' section displays a competency breakdown and an activity breakdown with progress bars. The competency breakdown shows 'Client Care and Practice' at 100%, 'General' at 98%, 'Professionalism and Ethics' at 98%, 'Regulatory Compliance and Consumer Protection' at 98%, and 'Technical Competence' at 98%. The activity breakdown shows various tasks such as 'Prepared for client meeting', 'Conducted client engagement', 'Prepared advice documentation', 'Discussed appropriate advice strategies', 'Modelled strategies and researched products', and 'ADM registration / track office activities' all at 100% completion.



PLAN AND LOG
REQUIREMENTS, WITH
FULL VISIBILITY FOR
CANDIDATES AND
SUPERVISORS



QUICK SIGN OFF
FUNCTION FOR
SUPERVISORS AND
LICENSEES WITH
TOTAL CLARITY
FOR CANDIDATES



KEY MILESTONE
REMINDERS TO KEEP
EVERYONE INFORMED

IF YOU'RE INTERESTED IN ACCESSING PY
MANAGER AS A CANDIDATE, SUPERVISOR OR
LICENSEE, REGISTER YOUR INTEREST WITH
US TODAY AT RISKACADEMY@TAL.COM.AU

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WHAT OUR STUDENTS THINK ABOUT TAL RISK ACADEMY'S PY PROGRAM:

“I love how the training session was structured with a blend of theoretical and interactive content... It feels like in four hours we were able to learn strategies that could take someone years to develop.”

“The most interactive workshop I've been to. I felt comfortable to contribute and wasn't worried if I said the wrong thing. Definitely recommend!”

“The workshop I attended is easily the best learning opportunity that I've had on my PY.”

LEARN MORE ABOUT GETTING THE MOST FROM YOUR PROFESSIONAL YEAR AT
TAL.COM.AU/PROFESSIONALYEAR

INTERESTED IN ACCESSING PY
MANAGER? EMAIL US TODAY AT
RISKACADEMY@TAL.COM.AU