2023 Course Planner

Explore the live courses for the first half of 2023, as well as what's available on-demand right now to boost your know-how. We'll add more courses throughout the year. **View** the latest on-demand courses or view the below course details by selecting one of the following options.

LIVE WEBINARS, MASTERCLASSES AND WORKSHOPS

Advice Skills and Training

RISK ESSENTIALS

Essentials Live
Virtual workshop
- 3 May, 10am–1pm AEST

ADVICE AND BEST PRACTICE

AskAnExpert: Tech Series
Webinars running monthly
- 23 February, 12–1pm AEDT
- 30 March, 12–1pm AEDT
- 27 April, 11am–12pm AEST
- 25 May, 11am–12pm AEST
- 27 June, 11am–12pm AEST

ESTATE PLANNING

The Fate of the Family Trust
Webinar
- 19 April, 11am–12pm AEST

INSURANCE IN SUPER

Insurance in Super Fundamentals
Webinar
- 14 June, 11am–12pm AEST

INCOME PROTECTION

Switching Gears: The IP Replacement Conversation
Masterclass at various times
- 7 March: Melbourne
- 8 March: Central Coast
- 9 March: Newcastle
- 10 March: Canberra
- 15 March: Sydney
- 22 March: Adelaide
- 24 March: Perth
- 28 March: Brisbane

BUSINESS INSURANCE

Business Insurance Funding
Webinar
- 29 March, 11am–12pm AEDT

Business Management

MARKETING

Embracing Equity: 2023 International Women's Day Event
Webinar
- 8 March, 12–1pm AEDT

BUSINESS STRATEGY

Market Update: Advice Practice Valuations in a Post-Exam World
Webinar
- 15 March, 12–1pm AEDT

Cyber Security
Webinar
- 12 April, 11am–12pm AEST

Education and Professionalism

REGULATORY CARE AND COMPIANCE

Life Insurance – The Year Ahead
Webinar with Scott Hoger & Phil Anderson
- 15 February, 12–1pm AEDT

ETHICS AND PROFESSIONALISM

Ethics Month Webinar Series
Webinars running weekly
- 10 May, 12–1pm AEST
- 17 May, 12–1pm AEST
- 24 May, 12–1pm AEST
- 31 May, 12–1pm AEST

Professional Year

PROFESSIONAL YEAR PROGRAM

Client Conversations Workshop
Virtual workshops over two days:
- 9 and 23 March, 8.30–10.30am AEDT
- 4 and 18 May, 11am–1pm AEDT

Ethical Dilemmas Workshop
Virtual workshop
- 2 May, 11am–1pm AEST

Risk Advice and Strategy Workshop
Virtual workshop
- 1 and 15 June, 11am–1pm AEST

TAL / Risk Academy

ON-DEMAND COURSES

Advice Skills and Training

RISK ESSENTIALS

- Essentials On-Demand
- Intro to Claims
- Intro to Risk Products
- Intro to Underwriting

ADVICE AND BEST PRACTICE

- Advice Foundations
- Advice and Best Practice Fundamentals
- Advice and Best Practice Process
- Advice and Best Practice Techniques

RISK PRODUCT

- Beneficiaries: Good, Bad and Indifferent
- Comparing Group, Direct and Retail

UNDERWRITING

- Income Splitting
- In Practice: The New Sustainable IDII World

ESTATE PLANNING

- Estate Planning Fundamentals
- Estate Planning Process
- Estate Planning Techniques
- Estate Planning Masterclass

INSURANCE IN SUPER

- Insurance in Super Fundamentals
- Insurance in Super Funding
- Insurance in Super Structures
- Insurance in Super Masterclass

INCOME PROTECTION

- Best Interest Balancing Act
- Income Protection Fundamentals

BUSINESS INSURANCE

- Business Insurance Fundamentals
- Business Insurance Structures
- Business Insurance Masterclass
- Dodging the Buy/Sell Disaster

CLIENT ENGAGEMENT

- Creating Engaging Conversations
- Engaging with Vulnerable and Disadvantaged Customers
- Interviewing Tips from the Pros
- Making Client Consent Engaging
- Selling Risk Cover
- The Five Soft Skills You Must Have
- The Unreasonably Biased Client

MENTAL WELLNESS

- Mental Wellbeing: Keeping it Simple
- Mental Wellbeing: Thriving in the Financial Advice Industry
- Supporting Clients at Claim Time
- Supporting Grieving Clients: Fireside Chat with the Experts
- Working Empathically

Business Management

MARKETING

- Getting Your Value Proposition Right
- Modern Marketing Course 1: Filling the Funnel
- Modern Marketing Courses 2 and 3: Who is Right For You and Getting on their Radar Screen
- Modern Marketing Courses 4 and 5: Establishing Trust and Generating Referrals
- Modern Marketing Course 6: COI (Centre of Influence) Marketing
- Modern Marketing Course 7: Strategic Alliances
- Modern Marketing Course 8: Being an Authority
- Modern Marketing Course 9: Improving Engagement
- Modern Marketing Course 10: Getting Social

BUSINESS STRATEGY

- Advice Efficiency Processes and Tools
- Effective Programs for Developing and Retaining Financial Advisers
- Fee for Advice
- How Risk Advisers Can Continue to Prosper
- Navigating Professional Year
- Time is Money: Delivering Value for Clients and Efficiency for Advisers

Education and Professionalism

ETHICS AND PROFESSIONALISM

- Ethics and the Risk Management Process
- Solving your Ethics Dilemmas
- The Adviser as Nostradamus
- Ethics and Dilemmas Masterclass

Professional Year

PROFESSIONAL YEAR PROGRAM

- Financial Adviser Exam Masterclass

ARTICLES

The Golden Rules of Insurance Advice Series

1. **Avoiding the Adviser Sin of Omission**
   By David Glen
2. **Setting the Right Amount**
   By David Glen
3. **Paying the Right Person: Part 1**
   By David Glen
4. **Paying the Right Person: Part 2**
   By David Glen
5. **Payment in the Right Form at the Right Time**
   By David Glen

Estate Planning Series

1. **Not an Optional Extra**
   By David Glen
2. **Ignore Life's Trigger Events at Your Peril**
   By David Glen

Business Insurance Series

1. **Building Blocks of Business Succession**
   By David Glen
2. **Managing Equity Risk**
   By David Glen
3. **Buy/Sell: Default Ownership Structure Revealed**
   By David Glen
4. **Buy/Sell: Bare Trust Mystery Explained**
   By David Glen
5. **Mitigating Key Person Risk**
   By David Glen
6. **Defeating Debt and Guarantee Threats**
   By David Glen

Other Business Insurance Articles

Taking Care of your Self-Employed Clients
By Jo Hetherington

The Must Have Succession Plan
By David Glen

Tips from the Business Insurance Experts
By Bernard Maughan and Paul Stafford

Understanding Business Insurance Article
By Jason Bamford

Understanding Australia's Business Structures
By David Glen

Cyber Security Series

Cyber Security for Financial Advisers
By Adara Campbell

Protect your Advice Business Online
By Adara Campbell

Online Account Security for Financial Advisers
By Adara Campbell

Device Security for Financial Advisers
By Adara Campbell

Other Topics

Introducing the New World of the Reasonable Life Insured
By David Glen

Languishing – The Mood of this Era
By Vaish Harishanker

Neglect SMSF Liquidity at Your Peril
By David Glen

The Privacy Act
By David Glen

Premium Funding for the Future
By David Glen