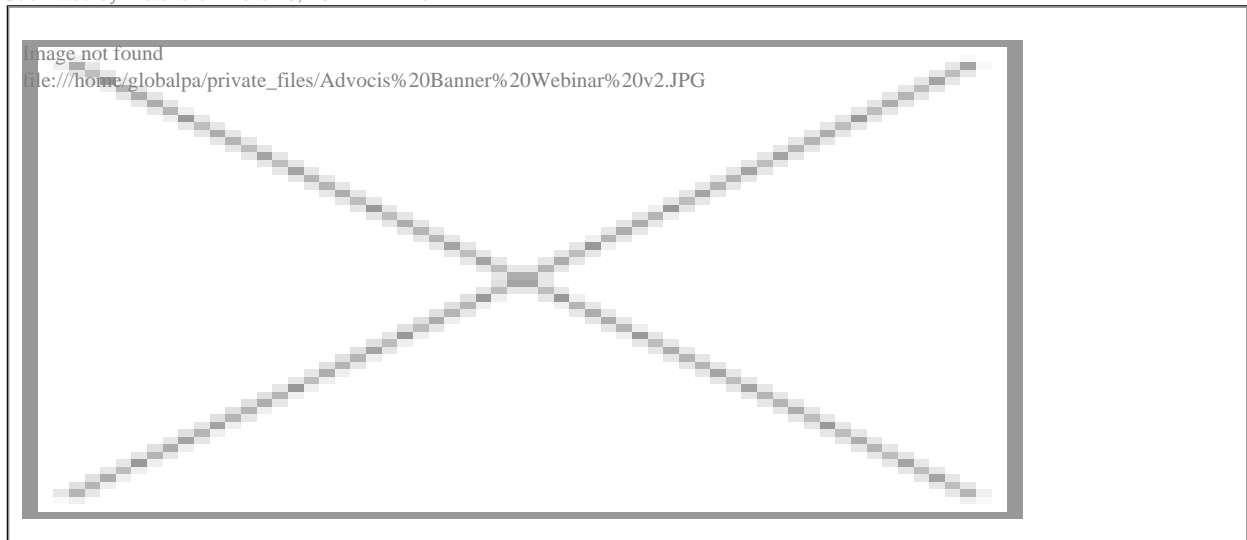




GLOBAL PACIFIC  
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## Advocis Greater Vancouver Presents Practice Development Series Module #6B: Analysis (Mentor Input)

Submitted by Victoria on March 9, 2021 - 11:12am



### Practice Development Series

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to provide additional guidance and support to participants. The workshop will be facilitated by the participants, and the workshop will be facilitated by the participants.

This Webinar is Complimentary to both Members and Non-members

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## Module Six: Analysis

The initial interview and fact finding process will uncover a client's financial goals and priorities. The analysis and recommendation will differentiate you from other advisors in the marketplace. In this module, you will learn how to:

- Prepare a financial plan and analysis
- Identify opportunities to improve a client's financial situation
- Prepare recommendations to address a client's needs.
- Give full and adequate disclosure of all assumptions made in the analysis
- Be aware of the life insurance policy replacement rules when making changes to current coverage.

\*Module Six has been approved by The Institute for 3.0 CE credits.





































# Development Series Includes:

Source URL: <https://gpps.ca/bulletins/advocis/2021-03-09/advocis-greater-vancouver-presents-practice-development-series-module-6b-analysis-mentor-input>

- **Module 1A:** Business Planning: September 15, 2020
- **Module 1B:** Business Planning/Mentor Input: September 22, 2020
- **Module 2A:** Marketing: October 6, 2020
- **Module 2B:** Marketing/Mentor Input: October 20, 2020
- **Module 3A:** Prospecting: November 17, 2020
- **Module 3B:** Prospecting/Mentor Input: November 24, 2020

## Modules 4-6: Hosted by Advocis Greater Vancouver:

- **Module 4A:** Preparation: January 12, 2020
- **Module 4B:** Preparation/Mentor Input: January 19, 2021
- **Module 5A:** Client Engagement: February 9, 2021
- **Module 5B:** Client Engagement/Mentor Input: February 23, 2021
- **Module 6A:** Analysis: March 9, 2021
- **Module 6B: Analysis /Mentor Input: March 16, 2021**

## Modules 7-9: Hosted by Advocis Greater Kootenay:

- **Module 7A:** Client Engagement: April 13, 2021
- **Module 7B:** Client Engagement/Mentor Input: April 20, 2021
- **Module 8A:** Business Management: May 11, 2020
- **Module 8B:** Business Management/Mentor Input: May 11, 2021
- **Module 9A:** Practice Management: June 8, 2021
- **Module 9B:** Practice Management/Mentor Input: June 15, 2021

## Modules 10-12: Hosted by Advocis Greater Thompson Okanagan:

- **Module 10A:** Marketing Your Practice: September 14, 2021