

Business Financial Solutions

Purpose: This course aims to provide learners with the skill and knowledge to evaluate business insurance risks and to provide advice to small to medium business operators and owners.

Course content:

- » Working in the NZ business market
- » Financial planning concepts for business owners
- » Business fundamentals
- » Protection of Business Assets
- » Legislation and Compliance
- » Business risk products for SME business and small business owners including life insurance, trauma, disability, income protection, employee benefits and general insurance
- » Business life cycle and sales/advice process
- » Report writing and review

Learning outcomes:

On successful completion of this course, learners will be able to:

- » identify and analyse the business client's needs, objectives and financial situation before developing appropriate solutions
- » present appropriate solutions to the client/business and key stakeholders/interested parties
- » develop a comprehensive business risk management/financial plan
- » complete and maintain necessary documentation
- » review and monitor a comprehensive business risk management/financial plan
- » establish risk acceptance criteria and evaluate risk strategies for a SME business

Delivery methods:

This course is designed to be delivered through a combination of individual study and in a classroom/workshop format led by an experienced facilitator. This course is also available and fully supported through the Adviserlink distance learning programme.

This course is approved by the New Zealand Qualifications Authority under the provisions of the Education Act 1989, and Adviserlink Learning Ltd is accredited to teach it.

Assessment:

Assessment for Classroom option:

Assessment	% of Overall Assessment
Pre-course assignment – Readings and short answer questions	10%
Post-course assignment – case study: Business Risk Management plan	40%
2-hour closed book examination	50%

Assessment for Distance learning option:

Assessment	% of Overall Assessment
Assignment 1 – short answer and scenario based questions	5%
Assignment 2 – short answer and scenario based questions	5%
Assignment 3 – case study Business Risk Management plan	40%
2-hour closed book examination	50%

Pre requisite/s:

Open entry although it is recommended that learners complete the Practice Management course before attempting this course to provide a broader perspective of small business management and ownership.

Dates of course/s:

Registrations for distance learners are accepted at any time throughout the year. Please refer to the course calendar on our website www.adviserlink.co.nz for the date/s and location of our classroom options.

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