Personal Risk Management

Purpose: This course aims to provide learners with the necessary skills and knowledge to identify the issues and processes involved in personal risk management (insurance), and to provide advice on effective strategies to mitigate risk.

Course content:

- An overview of the NZ Insurance Industry
- Risk management practices and techniques
- Legislation and compliance relevant to the insurance industry
- Risk products and services including general (non life) insurance and life insurance
- The role of the underwriter and the underwriting process
- Advice process for providing insurance advice

Learning outcomes:

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

- establish effective relationships with clients and identify client needs, objectives and financial situation
- evaluate clients insurance needs and develop and present appropriate strategies and solutions to meet those needs
- negotiate, implement, monitor and review an insurance policy/plan/transaction
- comply with industry legal requirements, regulatory obligations and professional codes
- establish and maintain appropriate client files and records
- develop a personal risk management plan

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: Personal 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: Personal Risk Management plan	40%
2-hour closed book examination	50%

Pre requisite/s:

Open entry

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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