FINERTY ACADEMY

Module 7:

GROWTH Management WORKSHOP
(2-Day Workshop, 9.00am – 6.30pm)

Aim:

This 2-day GROWTH Management & Productivity Management workshop gives a holistic overview of a boosting your business Productivity in a Purposeful manner as frameworks to model your Professional Practice for your business.

Purpose and benefits:

Professionals will have an awareness, an analysis and appreciation of the following:

- The Global Environment we live in
- The Regulatory framework we work in
- The Industry we operate in
- The Workplace culture we are in
- The Teamwork required
- Overall Personal well-being
- Professional will develop an awareness, analyse into these areas and design an action plan

No man's an island. We operate in different environment and are yet impacted by global climate. Thus the need to be aware of the happening, the up-coming industry changes, to develop a strategic action plan to ride the next wave.

In this workshop, we will explore into the GROWTH Management and have an awareness, an analysis and develop an action plan with alternatives given the overall environment we operate in.

This module is part of the 7-Module Certified KASHGrowth Professional (CKP) series. Completion of the CKP Series will strengthen your Identity as a Professional, positively Impact your clients' finances, enhance the knowledge you Impart to your clients and advisers, increase your Influence in their lives and Inspire them to achieve even more. Participants can expect to enhance their Professionalism, enlarge their Productivity and expand their Profitability.

Learning Outcomes

By the end of the workshop, participants will be able to

- Understand the Leadership and Competency Framework – YOUR KASHGrowth
- Understand the Global Environment
- Understand the Regulatory Environment
- Understand the Industry Analysis
- Understand the Workplace Culture
- Understand Team Building
- Understand the Importance of holistic Personal Well-Being

Participants will be guided to submit a Strategic Action Plan.

Participants will also be able to

- Briefly describe the Journey to RETIRE framework,
- Briefly describe the Journey of HEALTH framework,
- Briefly describe the Journey for LEGACY framework,
- Understand CLIENT Management to effectively perform Client Attraction & Client Retention
- Recognise the PRACTICE Management framework to better organize your professional practice
- Recognise the PURPOSE Management Framework to increase your productivity and better align your business purposes to your life purposes.

Target Audience

- Wealth Managers, Financial Advisers, Insurance Advisers
- Estate Planners, Will-Writers
- Bankers, Relationship Managers
- Financial Intermediaries aspiring to enter the estate planning market will be more equipped and more confident.
- Senior Financial advisers will now have a comprehensive framework that consolidates all of their previous learning into an easy-to-remember and easy-to-present "Journey Style" presentation.
- Managers and mentors can deepen their learning and adopt a more holistic approach to coaching their advisers.

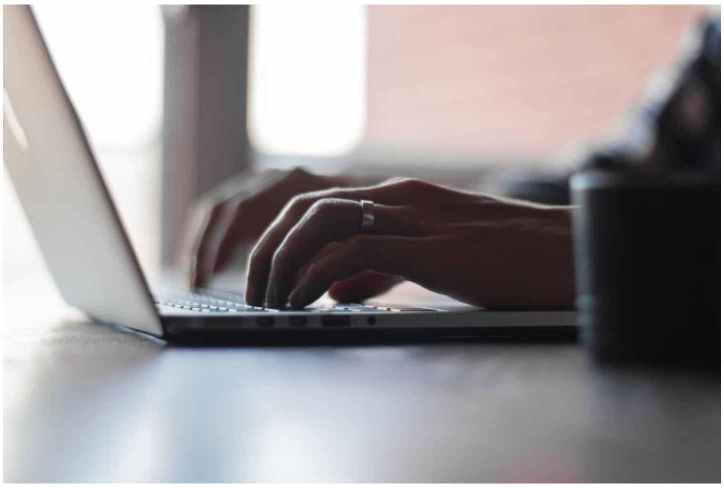
Name of Organisation/ Course Owner

Finerty Academy Pte Ltd.

Teaching Styles

The program will be conducted through case studies, role plays, short lecturing, group discussions and sharing, personal reflections and peer learning.

This program is designed using adult learning concepts. Gayne's and/or KOLB's design theories are applied together with sound design principles, effective retention strategies so that different types of learners (Visual/Audio/Tactile/Kinaesthetic learners) can achieve the learning outcomes and subsequently transfer and apply their learnings in their workplace.



The Outline of the 2-Day Workshop

Lesson Plan - DAY 1

Lesson 1: Overview of Leadership and Competency Frameworks

- Introduction and Objectives setting
- Introduction to proprietary Competency Framework YOUR KASHGrowth
- The Comprehensive GROWTH Management Framework
- Discussion Case Study
- Small Group Discussion
- Large Group Sharing

Lesson 2: The Global Environment (Part 1)

- Global Driving Forces and Mega Trends
- Opportunities and Threats
- Small Group Discussion
- Personal Reflection & Large Group Discussion

Lesson 3: The Global Environment (Part 2)

- Personal Assignment Time
- Key Entries for Submission
- Contextualizing for Personal Submission
- Personal Reflection & Group Discussion

Lesson 4: The Regulatory Environment (Part 1)

- Past Regulatory Changes
- Major Milestones
- Potential Future Changes
- FAA, Consumer Protection (Fair Trading) Act
- HOTA, Mental Capacity Act, LPA, Palliative Care
- Retirement Age
- CPF Rules
- Property Rules
- Financial Rules
- Competency Rules
- Personal Reflection & Group Discussion

Lesson 5: The Regulatory Environment (Part 2)

- Personal Assignment Time
- Key Entries for Submission
- Contextualizing for Personal Submission
- Personal Reflection and Small Group Discussion

Lesson 6: The Industry Analysis (Part 1)

- Case Discussion and Sharing
- The Complete Wealth Acquisition, Accumulation and Allocation Framework - Journey to RETIRE and ENJOY Your Journey
- Small Group discussion, Large Group Sharing,
- Peer Learning, Role-Play

Lesson Plan - DAY 2

Lesson 7: The Industry Analysis (Part 1a)

- Market Positioning
- Sustainable Competitive Advantage
- Key Success Factors
- Personal Reflection and Small Group Discussion

Lesson 8: The Industry Analysis (Part 2)

- Personal Assignment Time
- Key Entries for Submission
- Contextualizing for Personal Submission
- Personal Reflection and Small Group Discussion

Lesson 9: The Workplace Culture (Part 2)

- Different Types of Work Culture
- Different Areas of Influence
- Being a Positive Influence in your Workplace
- Being a Positive Influence in your Company
- Being a Positive Influence in your Industry
- Personal Assignment Time
- Key Entries for Submission
- Contextualizing for Personal Submission
- Personal Reflection & Group Discussion

Lesson 10: Team Building

- Types of Teams
- Requirements of Teams
- Roles within a team
- Stages of Team Formation
- Characteristics of a High Performing Team
- Personal Reflection & Group Discussion

Lesson 11: Health and Wellness

- SELF Management
- Physical Well-Being
- Medical Well-Being
- Material Well-Being
- Mental Well-Being
- Emotional Well-Being
- Spiritual Well-Being
- Integrated into SMARTER Goals
- Personal Reflection & Group Discussion

Lesson 12: Wealth Management as part of Comprehensive Wealth Planning

For Your Clients – Wealth Protection as part of Comprehensive Wealth Planning

- The Comprehensive Framework for managing Wealth - Journey WEALTH
- Guarding Your Wealth – Journey of HEALTH
- Gaining More Wealth – Journey to RETIRE
- Giving Your Wealth – Journey for LEGACY

For Your Professional Practice – Wealth Protection as part of Professional Practice

- Growing Your Practice – PRACTICE Management
- Getting Your Goal – Productivity
- Management thru PURPOSE
  Guiding Your Business – GROWTH Management
- Personal Reflection & Group Discussion

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- Where financial liberty begins -