

Business Insurance Master Class I

A “must-attend” Program for those who wish to make headway in their insurance career.

Strategic Market Entry Foundation

A NEWLY ENHANCED Intensive 2-Day* Training Program designed to provide financial practitioners with a comprehensive foundational knowledge, skills and sales ideas in business insurance. *12 CPD Hours



INSTRUCTOR

LIM YUEN SEONG

Full-time & Independent trainer/coach

- Regionally recognised expert in business insurance training.
- Instructor for “train-the-financial trainer” specialist programme
- Coach and mentor to many top financial and insurance practitioners
- Prolific writer with published articles and over 20 books written
- Practitioner, manager, trainer and industry leader for over 20 years
- Developed several text materials for RFP, CFP and FChFP programmes
- Designs innovative training programmes and presentation materials for financial services companies internationally.
- Certified Neuro-Linguistic Programming (NLP) practitioner

Who Should Attend?

Life Insurance Agents, Financial Advisors and Agency Managers, Trainers and Management staffs of insurance companies, banks, unit trust companies and financial services firms.

Program Outline

Introduction

- Learning Strategy and Success factors
- Concept of Business Insurance

Business Succession

- Business Organisations
 - ✓ Types of businesses
 - ✓ Structures & Problems
- Succession Issues and Risks
 - ✓ Stakeholders
 - ✓ Conflict management
 - ✓ Solution options and selection

Personal Estate & Income Protection

- Executor's Risks
 - ✓ Authority to act
 - ✓ Ability to manage
 - ✓ Sufficient cash to support
- Estate Shrinkage & Destruction Risks
 - ✓ Loss of business value
 - ✓ Guarantor's personal liability
 - ✓ Partnership liabilities
- Dependents' Income Risks
 - ✓ Profit plough-back policy
 - ✓ Cashing the inheritance
 - ✓ Fraud & mismanagement of fiduciaries

Business Risk Management

- Business Risks
 - ✓ Loss of profits
 - ✓ Cash flow disruption
 - ✓ Major financial liabilities
 - ✓ Liquidity risk analysis – Financial ratios
- Intellectual Capital Risk
 - ✓ Types of Intellectual Capital
 - ✓ The 'Intellectual Capital – Profit' connection
- Keyman Risk
 - ✓ Definition & Identification
 - ✓ Impact of death & disability
 - ✓ Keyman Insurance
 - ✓ Valuation methods
 - ✓ Tax implications

Business Insurance – Solution Package

- ✓ Business succession plan
- ✓ Business risk management plan
- ✓ Buy-Sell Contract
- ✓ M & A
- ✓ Power of Attorney
- ✓ Assignment
- ✓ Will
- ✓ Trust – Statutory & Non-statutory
- ✓ Life Insurance
- ✓ Service contract

REGISTRATION FORM

Course Title: Business Insurance Master Class I

Course Venue: _____

Course Date: _____

Participant Particulars

Name: _____

H/P No: _____

Email: _____

Company: _____

Company/Private Correspondence Address: _____

Phone: () _____

Fax: () _____

Payment Particulars

Registration Fee: RM 800 per participant

Enclosed my cheque No. _____ payable to "BrainStation Academy Sdn Bhd"

or

Direct bank-in to BrainStation Academy's Account:

Bank: Maybank Berhad

A/C No.: 5-1404-8217-66-0

Please enclose a copy of your bank-in slip

Signature: _____

Date: _____
