

Continuing Professional Development Certificate

Closing the advice gap and impact creation beyond Chartered

Date

Wednesday, 04 December 2024

Time

1:00 pm – 2:00 pm

Speaker

Lewis Prosser, MSc (Finance), FPFS, Chartered Financial Planner, Head of Professional Development, St. James's Place

In this IIL financial planning webinar, Lewis Prosser gives a perspective on the relationship between the advice gap and the skills gap.

Learning Objectives

- Examine the case for integrating 'soft skills' in the qualification criteria for financial advisers
- Appreciate the relevance of understanding the learning and thinking styles
- Assess lifelong learning opportunities as avenues for extending and expanding your impact, that of your team and the profession