



شركة ميرك العربية السعودية
MEIRC Saudi Arabia

Award in Bancassurance

Duration 3 Days

Program Summary

This new single-unit qualification is designed specifically for non-UK financial advisers and insurance agents working in the banking sector. It provides a solid grounding in the relevant core financial, life assurance and insurance products, and offers guidance on what constitutes sound professional practice, thereby providing a framework for ethical behavior.

Objectives

At the end of this unit, candidates will be able to demonstrate knowledge and understanding of:

- ↪ The main elements of the financial services and insurance industry;
- ↪ The main insurance products;
- ↪ Savings and investment products;
- ↪ Retirement planning products;
- ↪ What constitutes good and ethical client practice?

Recommended Entry

The Award is particularly suitable for non-UK financial advisers and insurance agents working in the banking sector and operating in either a regulated or non-regulated environment.

Who should attend or potential job occupation?

The Award is open to anyone working in the insurance and financial services sector irrespective of educational background or experience.

Course Content

1. Know the main elements of the financial services and insurance industry as it relates to the Bancassurance sector
2. Understand the main insurance products
3. Understand savings and investment products
4. Understand retirement planning products
5. Understand the importance of the client fact find and how to identify client needs.
6. Understand what constitutes good and ethical client practice