

### What our participants say?

*Lucy Bricard | Cornerstone Planners*

This course has expanded my knowledge and skills needed in servicing my clients in a more comprehensive manner, especially in the area of financial counseling and financial education. The more educated my clients are in these financial matters, the easier it is for me to work with them. It has given me a solid platform to educate the public in financial planning. It has enabled me to move to another level in my profession which would not have been possible without this course. Now I can educate, counsel and plan for my clients which is more holistic and comprehensive. I believe that I am now better equipped to meet the future challenge ahead in my industry with this course.

*Dr. Patrick Chan | Nanyang Technological University*

A complete professional competence program in Financial Education. Ideal for anyone who wants to serve, motivate and guide individuals in a complex financial services industry.

*Norman Sim | AXA Life*

This course has enabled me to gain a valuable insight into the different money personalities of people whom we interact in our daily lives. We understand our clients/prospects better and are able to address their concerns more effectively. This course is indeed uniquely different from other financial services courses and is a good complement to our existing skill sets.

*Alison Poh | AXA Life*

Interesting contents especially the Moneymax® grid. I believe the tools & templates will be very beneficial to all in the financial planning industry. The approaches we learned will definitely enhance & improve the quality of life (financially) for those we serve.

*Eric Seah | Prudential*

Very satisfied.....!

*Michelle Teo | TM Life Insurance*

A different way of raising an advisor's profile to be a trusted advisor who cares to educate, counsel and help people through a holistic approach.

*See Mian | Prudential*

Excellent course content! The module on Financial Psychology is particularly useful and valuable to a practitioner in better understanding clients and prospects.

*Edward Ong | AIA*

Very useful and applicable besides providing excellent personal development. It will enhance my ability to advise and help my clients.

[Note: some respondents to our feedback opt to remain anonymous; with some citing the Personal Data Protection Act]