

Solutions and Service Delivery > Other Services

Title	Identifying suitable clients for referral to insurance brokers
Code	106628L5
Range	Cooperating with insurance agents to provide advisory services on insurance. This applies to advisory services to private banking clients across different types of insurance products.
Level	5
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Evaluate the use of insurance as a liquidity planning tool as part of clients' overall wealth solution Be able to: <ul style="list-style-type: none"> • Evaluate concepts related to insurance in order to identify the needs of clients • Refer to suitable broker in order to identify suitable solution for clients 2. Identify needs of clients Be able to: <ul style="list-style-type: none"> • Meet with clients to obtain information about their financial situation, needs, existing coverage, etc. in order to identify their needs for the use of insurance as a liquidity planning tools as part of the clients' overall wealth plan.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Identifying the need for insurance services and make a suitable reference.
Remark	