

# DIRECTORY OF SERVICES

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Guide to:

PERSONAL FINANCE, TRAINING and BUSINESS SERVICES

**INSURANCE AND PERSONAL FINANCE:** Financial services to allow individuals to effectively use their financial resources to pursue their life goals.

## Services

- Insurance Broking
  - Home and Motor Insurance
  - Individual life and Health insurance
  - Commercial Property and Motor insurance
  - Group Employee Benefits
  - Liability insurance
- Personal Financial Management
  - Personal Financial Planning (retirement, education, investment, homeownership etc.)
  - Financial training and coaching
  - Financial counseling
- Loan negotiation
  - Mortgages
  - Personal loans
- Investment product sales
  - Mutual funds
  - Annuities
  - Money market accounts
  - Deposits
- Monitoring personal finances
  - Periodic review of financial situation
  - Managing personal finances using electronic software such as Microsoft Money
  - Cash management, including bill payment, personal account management
- Investment management
  - Portfolio management
  - Asset allocation.

**LEARNING, EDUCATION AND TRAINING:** Learning opportunities that encourage action to change individual behavior. These include presentations, seminars, workshops and courses (up to 12 weeks).

## **Services**

- Personal Financial Education including:
  - Money Management
  - Retirement Planning
  - Career transition (new job, job loss etc)
  - Earning, spending and saving
  - Credit and Debt Management
  - Risk management, using insurance
  - Investing
- Sales Management
  - Sales strategy
  - Sales training
  - Sales and negotiation
  - Sales force development
  - Managing sales teams
- Performance Management
  - Building an effective performance management system
  - Appraising Employees
- Business Improvement.
  - Process Analysis
  - Process Design
  - Process Improvement
  - Business Re-engineering
- Strategy and Planning
  - Business Strategy
  - Marketing
  - Brand
  - Business Planning and Budgeting
- Orientation for new workers.

**BUSINESS SERVICES:** Advisory services to improve business profitability and to reduce business risks, specifically in:

## Services

- Strategic Planning
  - Process creation
  - Plan development
  - Facilitation
- Business Planning
  - Process creation
  - Plan development
  - Facilitation
- Business Management
  - Problem solving
  - Change management
  - Business improvement
- Group Employee Benefits Management
  - Benefits education
  - Programme design and negotiation
  - Plan analysis and monitoring including for union negotiations
  - Plan audits
  - Plan administration
- Sales Management
  - Sales strategy
  - Sales training
  - Salesforce management
- Performance Management
  - Process development and implementation
  - Training
  - Measurement and monitoring
- Marketing Strategy and Planning
  - Marketing Strategy
  - Market Planning
  - Branding/Brand Strategy
  - Product Marketing
  - Campaign Development
- Security Risk Management
  - Training
  - Assessments
- Business Reengineering and Process Improvement
  - Process analysis
  - Process mapping
  - Process improvement
  - Process reengineering.