

### **Aged Care Skills Masterclass - Connecting with Clients**

Aged care advice provides an opportunity to grow your business and offer relationship-based advice to deepen your value proposition to clients.

Aged Care Steps have partnered with Jo Fox from Strengthening Practice in the UK to offer this unique Masterclass for advisers with experience in aged care advice.

If you have the technical knowledge but want to improve your skills and learn how to grow your business more effectively this is a workshop you can't afford to miss. But be quick. This is a limited opportunity while Jo is in Australia and workshop numbers are limited!

#### **What to expect?**

Aged care advice requires technical skills for strategy development and communication skills to navigate family discussions and facilitate effective decision-making, particularly in times of stress and conflict such as aged care.

Using a family case study, this session works through a practical approach to solving aged care problems, combining both skills.

Building on Jo's expertise in the field of social care theory and training social workers, this workshop is a hands on experience, designed to help advisers build skills and advice processes to enable more effective interaction with clients.

The case study will explore and put into practice:

- How to uncover the clients' true worries
- Identifying who needs to be involved in family discussions and how to raise issues
- Helping clients and families to evaluate the technical strategies and make decisions
- Documenting the process for improved compliance and to produce a value proposition for clients that combines the technical and emotional factors
- Ethics when dealing with Enduring Powers of Attorney and vulnerable clients.

Leave the workshop with increased competency and a package of tools to enable you to implement the skills into your client meetings and advice process. While this workshop focuses on aged care advice, the skills can improve client interactions in all advice scenarios.

#### **What are the details?**

This is four-hour workshop, but register and stay for our free two-hour bonus workshop.

- Advice skills workshop: 9.00am - 1.30pm (including morning tea)
- Lunch: 1.30pm - 2.30pm
- Bonus workshop: 2.30pm - 4.30pm

Prices and locations are below. This workshop will be approved for CPD points from the Financial Planning Association.

### Free bonus workshop - learn what is driving adviser success

Stay for lunch and then join us for an additional two-hour workshop to learn what successful advisers are doing.

In this session, Aged Care Steps will share:

- Tips for how to build an aged care business model
- What advisers are doing to achieve success
- Ideas to start client conversations on aged care with new and existing clients
- Pricing and service models that are working
- How to add efficiencies into your advice process.



**Bonus workshop for registered attendees of the Connecting with Clients workshop**

Available to advisers who register for the Connecting with Clients skills workshop.

### What are the dates and locations?

Don't miss the opportunity while Jo Fox is in Australia.

- **Perth** : Thursday 6 September - Holiday Inn, 778 Hay St
- **Brisbane**: Tuesday 11 September - Christie's Corporate, 320 Adelaide St
- **Melbourne**: Friday 14 September - TBC Melbourne CBD
- **Sydney**: Thursday 20 September - TBC Sydney CBD
- **Adelaide**: Friday 21 September - TBC Adelaide CBD

### What will it cost?

- **Subscriber price\***: \$695 (including GST)
- **Non-subscriber price**: \$795 (including GST)
- The bonus workshop and lunch is provided free to registered attendees of the morning workshop.

\* Subscriber price is available to subscribers of the ACS Advice Generator or Business Toolkit. One discounted registration for each current subscription or licence.

### How to register?

Send an email to [training@agedcaresteps.com.au](mailto:training@agedcaresteps.com.au) to register for the workshop. Indicate which city you wish to attend. A registration form will be sent back.

## Who are your facilitators?



### Louise Biti

Louise is well known as the leading specialist in aged care advice in Australia, with over 20 years experience in analysing the Aged Care Act and how it impacts families and advice solutions.

Over this time, Louise has trained financial planners, lawyers and accountants as well as staff working in aged care services. This experience brings you the full perspective for structuring advice.

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### Jo Fox

Jo has spent 30 years working with children, young people and adults in social care in Australia and the UK. A social worker, she now runs *Strengthening Practice* in the UK.

Jo has been attracted to roles which focus on shaping human day-to-day life experiences. This has seen her move from social care roles working with elderly people into the world of protecting vulnerable children.

Her work in the field of reflective supervision is captured in a co-authored book "Reflective Supervision a Handbook". Her podcast with Gerry Nosowska 'Helpful Social Work.' is one of the top 5 podcasts for social work professionals in the UK.

Jo is partnering with Aged Care Steps to transform the technical rational world of social care theory and knowledge into practical tools and education for financial advisers, focusing on client conversations to facilitate better decision-making, particularly in times of stress and conflict such as aged care.