FAAA ACCREDITED CPD PROGRAM

The Art of **Client Care** and Practice

An interactive two-hour professional development workshop using wine as a framework for stronger client conversations, clearer recommendations and better professional judgment.

DURATION	DELIVERY	FORMAT
2 hours	**In person**	**Interactive workshop**

Presented by Meiron Lees

Former financial planner | Learning & development facilitator | Wine educator

COURSE OVERVIEW

A distinctive way to build practical client-facing capability

The workshop creates a structured, engaging environment in which participants reflect on the way they listen, question, communicate and recommend.

The Art of Client Care and Practice is a two-hour interactive professional development workshop designed for financial-services professionals.

Using wine as a framework, the workshop explores the core behaviours that support stronger client relationships: active listening, effective questioning, understanding preferences, communicating recommendations clearly, and building trust through sound judgment.

Rather than relying on a traditional presentation format, the session creates an environment in which participants can reflect on how they approach client conversations, how they form recommendations, and how communication style affects client understanding and confidence.

The workshop is designed to align with the Client Care and Practice CPD category by focusing on practical client-facing capability rather than technical product knowledge or regulatory instruction.

Designed for adviser-client interactions: discovery, review meetings, relationship management, recommendation delivery and client engagement.

Target audience

- Financial advisers
- Client-facing financial-services professionals
- Relationship managers
- Teams involved in client communication and engagement

FACILITATOR

Meiron Lees

Former financial planner with 10+ years' experience.
Created Sales Mastery programs.
Developed How to Be a Trusted Advisor.
Clients include IAG, TAL, Westpac, AMP and Citibank.

LEARNING OUTCOMES

Practical outcomes and workshop flow

Stronger client care, clearer conversations and more confident professional judgement - delivered through three applied modules.

01 **Observation, questioning and listening** Apply stronger observation, questioning and listening techniques.	02 **Clarity and relevance** Communicate recommendations with greater clarity, relevance and confidence.	03 **Adapting communication style** Adapt communication to different client preferences and decision-making styles.
04 **Trust and engagement** Strengthen trust through better client care and professional judgment.	05 **Evidence-based recommendations** Distinguish between assumption-led and evidence-based recommendations.	CPD **Client Care and Practice** Develop practical capability directly relevant to adviser-client interactions.

How it aligns with Client Care and Practice

Through structured activities and facilitated discussion, participants strengthen active listening, quality questioning, preference identification, tailored communication, confidence and trust-building behaviours.

Course outline

MODULE 1	**Building trust, active listening and effective questioning** Participants are introduced to the importance of presence, disciplined observation and trust building in the early stages of client interaction.
MODULE 2	**Clear communication and value articulation** Participants examine how individuals respond differently depending on their priorities and how to articulate value with clarity, relevance and confidence.
MODULE 3	**Tailored recommendations and positioning solutions effectively** Participants reflect on what makes a recommendation feel credible, relevant and well judged, and how best to position solutions in accordance with clients' preferred styles and communication preferences.

WINE ALIGNMENT

Client care principles through a wine lens

Wine provides a memorable framework for exploring how advisers build understanding, tailor communication and strengthen trust.

WINE ANALOGY	CLIENT CARE AND PRACTICE
First impression in the glass	Building trust and establishing credibility
Smelling before tasting	Active listening and effective questioning
Describing wine simply	Clear communication and value articulation
Matching wine to preferences	Tailored recommendations based upon clients’ needs
Comparing wine styles	Positioning solutions effectively
Recognising a quality wine	Sound judgement and delivering appropriate advice

Course format

- Duration: 2 hours
- Delivery mode: In person
- Format: Interactive facilitated workshop
- Method: Discussion, reflection and practical application
- Suitable for: team sessions, conference breakouts, leadership groups and professional development events

CPD note

This workshop aligns with the Client Care and Practice CPD category for financial-services professionals. This activity meets the guidelines for qualifying CPD and has been accredited for continuing professional development by the Financial Advice Association of Australia.

CPD Accreditation Number: 35676