

WHO ARE WE

Our journey began in 2011 and since then, Finerty Academy has been a leading one-stop training and education provider in the field of wealth empowerment and transformative leadership for financial leaders and consumers.

At Finerty Academy, we offer a wide range of programs such as utilizing transformative frameworks to equip participants with the skill sets to present impactful presentations, receive practical field-tested business models and processes to increase their business revenue. This enables them to provide strategic financial advice and drive positive outcomes while staying at the forefront of industry trends, regulations and best practices in today's dynamic business landscape.

Testament to the quality of what we provide, Finerty Academy has delivered training for over 2000 financial advisors and wealth planners from established financial institutions including DBS Bank, CIMB Bank, AIA Singapore, Avallis Financial, finexis advisory, Financial Alliance, Great Eastern, IPPFA, Manulife FA, NTUC Income, Phillip Securities, PIAS, Prudential, Promiseland, Singlife FA, Synergy, HSBC Life and more.

CORE OFFERINGS

Wealth Planning: Comprehensive training programs providing simple yet powerful frameworks and concepts in the area of comprehensive wealth, retirement, investment, insurance, estate and legacy planning.

Professional Certifications: Globally conferred professional Certified Financial Planner (CFP®) title and over 20 years of time-tested financial professional certification, Certified KASHGROWTH Professional (CKP™)

Leadership & Competency: Master the essential leadership skills such as team building, holistic personal well-being, awareness of the operational environment, and sensitivity to industry changes to navigate complex challenges, inspire teams, and drive organizational success.

Technology: Focused on emerging technologies like blockchain and artificial intelligence, providing participants with tools and skills to gain a competitive edge.

Communication and Sales Techniques: We delve into a wide range of techniques, including wealth languages, overcoming sales objections, utilizing storytelling to navigate challenging conversations. Our client profiling techniques empower you to build strong relationships and drive successful sales outcomes. We explore the psychology of buying, mastering verbal and nonverbal techniques, honing your listening skills, and utilizing various proprietary techniques and AI Tool to connect with clients on a deeper level.

WHY CHOOSE FINERTY ACADEMY?

✓	Singapore IBF Accreditation	All our programmes are IBF Accredited and achieved the industry recognized quality that complied to the <i>Skillsfuture</i> Framework
✓	Professional Certification	Approved Training Organization in Singapore, for CFP® Certification programme, the most desired and respected global certification in the financial planning industry
✓	CPD Hours	CPD Courses including CORE CPD Hours are available for various financial industry segments
✓	Price Competitiveness	We offer <i>preferential</i> corporate rates with IBF Funding, Skillsfuture Credit and UTAP Funding
✓	Quality of Trainers	Our trainers are ACLP/ACTA Certified and industry veterans, minimally with <u>5 years</u> of hands-on expertise in their respective fields and/or 3 years of financial training experience
✓	Track Record	Since 2011, trusted by more than 30 corporations and over 2000 learners. 96% of learners are satisfied that the contents of the course meet their training needs
✓	Learning Modes	E-Learning All Year Access Zoom Online Classes Facilitated Physical Classes
✓	Teaching Style	Our learning methodology is centered on <i>adult learning pedagogy</i> , incorporating interactive elements, case studies, small group sharing, large group discussions with hands-on activities to foster a stimulating and memorable learning experience.

Customer Service Excellence with Enneagram

Vivien Yap, Trainer



Vivien is a renowned International Enneagram Association (IEA) accredited Senior Trainer & certified Professional Coach who is passionate about empowering individuals with effective communication and leadership skills within the Financial Service industry & Singapore's leading companies.

With more than a decade of training experience, her corporate workshops have equipped organisations to realize their limitless potential and improve workplace cohesiveness through practical people management tools.

Her personal clients range from individuals who are looking for self-development, to some of Singapore's leading organisations & industry change makers. Armed with deep empathy & conviction, her workshops are known to be life transforming and impactful.

Corporate Clients. Please click [here](#) to the trainers' profile



Customer Service Excellence with Enneagram



*2-Day Programme, CPD Hours: 16
Time: 830am to 6pm (Lunch 1pm to 2pm)
Classroom Facilitated Training*

Explores Enneagram as a powerful tool for enhancing your customer service skills. Learners will gain a deep understanding of the 9 Enneagram types and their core motivations, enabling them to better understand diverse customer needs and behaviors, ultimately leading to stronger customer relationships and increased satisfaction

Through panel sessions, engaging activities, discussions and case studies, attendees will:

- Build a comprehensive knowledge base of customer service principles and best practices for each Enneagram type.
- Grow in their versatility and identify enhancement opportunities in their current customer engagement strategies.
- Develop tailored communication techniques that resonate with different Enneagram types.
- Foster empathy and adaptability to improve customer interactions.
- Understand the Enneagram personality framework and how it can be applied to client interactions.
- Identify your Enneagram type to better recognize your strengths and challenges in client servicing.
- Recognize and appreciate the different Enneagram types in clients to tailor your communication and service approach.
- Develop strategies for building rapport with clients by understanding their core motivations and needs based on their Enneagram type.
- Enhance your conflict resolution skills by applying Enneagram insights to defuse misunderstandings and manage difficult client situations.
- Understand what motivates your clients' financial decisions and what is deemed as gold standard servicing from each type's perspective.

By the end of the workshop, participants will be equipped with actionable insights and strategies to elevate their customer service excellence.

Customer Service Excellence with Enneagram



FUNDINGS AVAILABLE

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Eligible for **IBF-STS Funding and Skills Future Credit**. Finerty is also a partner of NTUC and their members can receive **UTAP Funding**, capped applies.

IBF-STS Funding	70% Funding for Singaporeans 40 and Above	50% Funding for Singaporeans below 40 and all PRs
Skillsfuture Credit	All Singaporeans aged 25 years and above, received an opening credit of S\$500 and may utilize their Skillsfuture Credit to pay for their course nett fee	
UTAP Funding	Grants NTUC members 50% unfunded course fee support for up to \$250 each year. Members aged 40 and above will receive support up to \$500 per individual	

Sample illustration on the different nett fees payable and reimbursable by a Singaporean aged 40 years old and an NTUC member:

Scenarios	Before Funding	After 70% IBF Funding	Skillsfuture Credit	Nett Fee Payable	UTAP Funding (NTUC Members)
1	\$1500	\$450	(\$450)	Zero-Cash	Not Applicable
2	\$1500	\$450	(\$150)	\$300	(\$150)
3	\$1500	\$450	\$0	\$450	(\$225)

[Please click here to download the price card](#)

<p>DAY 1: 4:15pm - 6pm</p>	<p>Lesson 4: Mini World Cafe Group Activity</p> <ul style="list-style-type: none"> · Group Discussion & Presentation Recap <p>Heart Centered Type 4</p> <ul style="list-style-type: none"> · Enneagram Type 4 Introduction · Enneagram Type 4 Industry Strengths · Enneagram Type 4 Roadmaps to Improvement · Enneagram Type 4 Client Service Excellence · Enneagram Type 4 Case Study 	<p>1 hour 45 min</p>
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LESSON PLAN (DAY 2)

<p>DAY 2: 8:30am - 9:00am</p>	<p>Registration and Recap from Day 1</p>	<p>30 min</p>
<p>DAY 2: 9am - 11am</p>	<p>Lesson 1: Head Centered Type 5</p> <ul style="list-style-type: none"> · Enneagram Type 5 Introduction · Enneagram Type 5 Industry Strengths · Enneagram Type 5 Roadmaps to Improvement · Enneagram Type 5 Client Service Excellence · Enneagram Type 5 Case Study <p>Head Centered Type 6</p> <ul style="list-style-type: none"> · Enneagram Type 6 Introduction · Enneagram Type 6 Industry Strengths · Enneagram Type 6 Roadmaps to Improvement · Enneagram Type 6 Client Service Excellence · Enneagram Type 6 Case Study 	<p>2 hours</p>
<p>11am - 11:15am (Break)</p>		
<p>11:15am - 1pm</p>	<p>Lesson 2: Head Centered Type 7</p> <ul style="list-style-type: none"> · Enneagram Type 7 Introduction · Enneagram Type 7 Industry Strengths · Enneagram Type 7 Roadmaps to Improvement · Enneagram Type 7 Client Service Excellence · Enneagram Type 7 Case Study 	<p>1 hour 45 min</p>
<p>1pm - 2pm (Lunch)</p>		

DAY 2:
2pm - 4pm

Lesson 3: Body Centered Type 8

- Enneagram Type 8 Introduction
- Enneagram Type 8 Industry Strengths
- Enneagram Type 8 Roadmaps to Improvement
- Enneagram Type 8 Client Service Excellence
- Enneagram Type 8 Case Study

Head Centered Type 9

- Enneagram Type 9 Introduction
- Enneagram Type 9 Industry Strengths
- Enneagram Type 9 Roadmaps to Improvement
- Enneagram Type 9 Client Service Excellence
- Enneagram Type 9 Case Study

2 hours

4pm - 4:15pm (Break)

DAY 2:
4:15pm - 6pm

Final Summary, Assessment Briefing + Assessment

1 hour
45 min

SIGN UP NOW!

<https://bit.ly/finertyclientserviceexcellence>

