

SEQUAL Equity Release Accreditation

Course Scope

Session	Topic
1	Objectives & Outcomes <ul style="list-style-type: none"> ▪ Equity Release Plans -An Emerging Market ▪ Product and Process ▪ The Regulatory Framework ▪ Know Your Client! ▪ Client Scenarios & Accreditation
2	Equity Release Plans –An Emerging Market <ul style="list-style-type: none"> ▪ Population Characteristics ▪ Retiring Without Superannuation ▪ Home Ownership and Property Market Trends
3	Product and Process <ul style="list-style-type: none"> ▪ Product Knowledge Matrix ▪ Identifying Transaction Costs ▪ Demonstrating Equity Preservation
4	The Regulatory Framework <ul style="list-style-type: none"> ▪ Credit Code and Privacy Act ▪ The ASIC Act ▪ SEQUAL Code of Conduct ▪ The Role of ASIC
5	Know Your Client <ul style="list-style-type: none"> ▪ Value Your Time –Client Profiling & Preparation ▪ Client Age Bands and Product Use ▪ Client Expectations & Commitment ▪ Fully Informed Decisions –Information or Advice?
6	Assessment & Accreditation <ul style="list-style-type: none"> ▪ Assessment ▪ Industry Accreditation