



**inseta**  
INSURANCE SECTOR EDUCATION  
AND TRAINING AUTHORITY

Working together for a skilled tomorrow

# SMALL BUSINESS SUSTAINABILITY SERIES

EMPOWERED TO INFLUENCE AND INSPIRE!

[www.inseta.org.za](http://www.inseta.org.za)

***INSETA acknowledges the unique challenges that small businesses in the sector are facing. To support you, we have compiled an exciting line up of speakers and topics that will help you to think differently about your business models and to grow your business into a sustainable entity.***

*We invite you take up this opportunity to enhance your toolset through accessing the best business coaches and understanding the keys to unlocking a better future for your business.*

## SESSION TOPICS:

Date	Topic	Speaker
<b>03 SEPTEMBER 2020</b>  <b>10h00 - 11h00</b>	<p><b>SESSION 1- FEAR AND HONESTY IN UNCERTAINTY</b></p> <p>Covid-19 has changed the relationship between adviser and client. Fear and risk have moved from selling tools for advisers to becoming very real motivators in clients' lives – those who know their adviser are much more willing to engage than they were a few short months ago, but their needs and demands have shifted dramatically.</p> <p>“The new normal” could change financial advice's role dramatically moving it to much more powerful position within financial services. Those who recognise this shift stand to gain, whilst those hoping for a return to pre-covid models may wane.</p> <p><b>THIS SESSION WILL COVER:</b></p> <p><b>HONESTY PAYS</b> Understanding how your values will drive your value proposition.</p> <p><b>THE POWER OF PROACTIVE COMMUNICATION</b> The when, how and what of fear reduction.</p> <p><b>HOW TO NAVIGATE THE DEMAND FOR NON REMUNERABLE (NON-PRODUCT BASED) ADVICE.</b></p> <p><b>CUTTING THE CORD</b> Ensuring clients are tied directly to your business not to products.</p>	<p><b>Jon Mackintosh</b> <b>ENCORE SA</b></p>

Date	Topic	Speaker
<p><b>01 OCTOBER 2020</b></p> <p><b>10H00 – 11H00</b></p>	<p><b>SESSION 2-POWER DYNAMICS</b></p> <p>Many of the business and practice assumptions around financial advice have been brought into question.</p> <p>Businesses and people are paying lip service to the “New Normal” fad while secretly wishing to be able to sit down in front of a client, physically, face to face. Come on, admit it, that would make life much easier for you. Trouble is that if the lockdown constraints are lifted tomorrow, they could be reinstated any day thereafter.</p> <p>Why be like all the others who are creating a “New Normal” when you could be totally different and develop a “Business Extraordinary” environment.</p> <p><b>THIS SESSION WILL COVER:</b></p> <ul style="list-style-type: none"> <li>• Breaking the sales cycle - what have we learnt about what clients really value?</li> <li>• Is the office necessary anymore?</li> <li>• Managing staff at a distance</li> <li>• Systemisation and service delivery</li> <li>• Does lockdown mean I have to work from my garage?</li> <li>• Power meetings by Zoom.</li> <li>• If I can maintain relationships despite Social Distancing, how do I do the same with Business Distancing?</li> <li>• Does my value proposition resonate online as it did offline?</li> </ul>	<p><b>Jon Mackintosh ENCORE SA</b></p>

Date	Topic	Speaker
<p><b>04 NOVEMBER 2020</b></p> <p><b>10H00 – 11H00</b></p>	<p><b>SESSION 3 - A BARROW OF GOLDEN NUGGETS FOR THE IFA TODAY</b></p> <p><b>WE DISCUSS:</b></p> <ul style="list-style-type: none"> <li>• 5 things that will set yourself apart from the competition</li> <li>• Will this be our new world</li> <li>• Most powerful lessons we can learn by looking back</li> <li>• The future of financial planning</li> <li>• Using the power of online media to build your brand</li> </ul>	<p><b>Francois Du Toit PROPULSION</b></p>

*For more information and to register for these Microsoft Teams online sessions please send us an email at [events@inseta.org.za](mailto:events@inseta.org.za) by no later than 28 August 2020.*



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## A NOTE ABOUT YOUR SPEAKERS:

### FRANCOIS DU TOIT

*Francois du Toit holds a B.Com Degree in Risk Management as well as the Post-Graduate Diploma in Financial Planning. He is an avid miniature figure painter with a passion for helping others succeed and for professionalising the Financial Services Industry. He holds the certification of CERTIFIED FINANCIAL PLANNER ® or CPF ® in good standing with the Financial Planning Institute of Southern Africa as well as being a registered Tax Practitioner with them and SARS.*

*Francois offers a unique and powerful proposition to businesses employing Financial Professionals. His practical experience, success, technical knowledge and understanding the challenges and opportunities in this field, ensure immediate practical application in the target market.*

*Growing, supporting and training Financial Professionals have been part of his fabric since the day he started in the industry back in 1998. He has conducted many talks, presentations, training and one-on-one sessions during this time. He has been the primary port of call for most of the Financial Planners and Broker Consultants he has met over the years. Recently he launched a podcast called PROpulsion.*

*His ability to answer questions that relate to practical on-the-ground issues, is what sets him apart from traditional trainers who may not have been in practice.*

#### ACCOMPLISHMENTS

- **SUCCESSFUL EXECUTIVE CONSULTANT**
- **NEW ACHIEVER OF THE YEAR**
- **NATIONAL TOP 10**
- **BROKER MANAGEMENT**
- **AGENCY MANAGEMENT**
- **STARTED A FEE-BASED FINANCIAL PLANNING PRACTICE**
- **PAST MEMBER FPI RISK COMPETENCY COMMITTEE**
- **CHAIRPERSON FPI CLIENT ENGAGEMENT COMMITTEE**
- **HOST OF THE PROPULSION PODCAST**

### JON MACKINTOSH

*Jon Mackintosh is the Managing Director of Encore SA. Jon has been a vocal, active and influential proponent of Professional Financial Planning and Business Management for 20 years. He has owned and managed Business Consultancies specialising chiefly in Financial services in Australia and South Africa for 14 of these.*

*Encore have worked with in excess of 2000 Australian, South Africa and Chinese financial planning businesses from individual agents to multi-director firms. They have also consulted to many stalwarts in the Life Insurance and Investment industries on both sides of the Indian Ocean on the development of a professional and discrete financial planning industry.*

*Jon brings a wealth of knowledge and experience as well as history of successful business transformation to the table and is regard as a powerful and deeply passionate speaker for and our industry.*

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