

## IFSO Webinars Q2 Calendar

### **FREE: Investment adviser: When a client complains about you**

**11am 23 May (15 mins)**

*This webinar will discuss a complaint made by a client about his investment adviser. The client believed the adviser was responsible for the reduced value of his investments when he cashed up. We will discuss the issues for the adviser and how the IFSO Scheme approached its complaint investigation and decision.*

**Presenter:** Karen Stevens, Insurance & Financial Services Ombudsman

[Register here](#)

### **General Insurance: Prove it or pay it – evidence required to decline a claim**

**11am 6 June (1hr)**

*If an insurer wants to decline a claim on the basis of a policy exclusion, the onus is on the insurer to prove the exclusion applies. Using case studies from complaints to the IFSO Scheme, this webinar will discuss general insurance exclusions and examine whether the evidence relied on by the insurer was sufficient to decline the claim.*

**Presenter:** Karen Stevens, Insurance & Financial Services Ombudsman

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### **Travel Insurance – when the customer misses the timeframes for reporting loss**

**10am 25 June (15 mins)**

*Focusing on a recent complaint to the IFSO Scheme, this webinar will look at the policy condition requiring the insured to report a loss within a specific timeframe. It will also consider how section 9 of the Insurance Law Reform Act 1977 applies to these provisions.*

**Presenter:** Karen Stevens, Insurance & Financial Services Ombudsman Scheme

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### **Income Protection Claims – what policies do and do not cover**

**11am 25 June (1hr)**

*Clients can be surprised when their income protection claim is not paid. Discussing case studies from complaints to the IFSO Scheme, this webinar will discuss the limitations of cover under IP policies, common issues that surprise clients and how you can help clients avoid these nasty surprises.*

**Presenter:** Karen Stevens, Insurance & Financial Services Ombudsman Scheme

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### **Health Insurance – Setting client expectations about cover**

**9.30am 30 July (15min)**

*Discussing a recent complaint to the IFSO Scheme, this webinar will look at some of the expectations clients may have as a result of the sales process and the*

*impact of this at claim time. We will discuss how complaints based on incorrect client expectations can be avoided.*

**Presenter: Virginia Douglas, Business Development Manager, IFSO Scheme**

**Register [here](#)**

## **How to have difficult conversations**

**11am 30 July (1hr)**

*Learn useful strategies and techniques for dealing with unhappy clients and see how you can preserve key client relationships through successfully managing difficult conversations. Using the tips and tricks of the IFSO Scheme's 20+ years' experience, this webinar will provide you with some ideas to improve the outcomes of any difficult conversation you may have to have with a client.*

**Presenter: Virginia Douglas, Business Development Manager, IFSO Scheme**

**Register [here](#)**