

Case Study

LIFE LICENSE QUALIFICATION PROGRAM (LLQP)



Dallas Skoda works in a client-facing administrative role for Braun Financial Services Ltd., a financial planning firm located in New Westminster, British Columbia. He's well on his way to becoming a certified financial planner, and says IFSE's Life License Qualification Program (LLQP) has been a big part of fulfilling that goal.

Dallas's work mainly involves the segregated fund, life insurance and disability insurance markets, and he's currently shadowing a senior advisor to learn how to build up his own book of business. IFSE's online LLQP came highly recommended to him by colleagues.

Although Dallas already came into the LLQP with a professional and educational background in finance, he found that the LLQP further expanded his existing expertise. Not only did Dallas learn about the intricacies of the insurance industry, the LLQP gave him the knowledge base to be able to convey complex information easily to clients.

How has the LLQP helped Dallas in his day-to-day job?

"The program gave me a better handle on how to explain technically oriented subjects, such as how some insurance products work, to clients. So instead of giving them a technical definition, which no client really has the knowledge of, background in or inclination to even listen to, the LLQP helped me explain these matters to someone who doesn't know anything about finance."

Advice from Dallas for other students taking the LLQP



"Get a background in finance first. I have a degree in finance, but anything helps. I would suggest even a one-year certificate or diploma. There were a lot of things in the LLQP in which it helps to have somewhat of a background on."



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