Pauline Azzopardi

FCII, B.Sc. (C. Hons), CeFA, Cert PFS

ASSOCIATE TRAINER

Ms. Pauline Azzopardi is an Associate Trainer at RISC Institute.

She has enjoyed a career of over 30 years, working in senior management roles with some of the world's largest international banking and insurance institutions including Munich Re and HSBC.

Pauline Azzopardi has been newly appointed by the Board of Supervisors of the European Insurance and Occupational Pensions Authority (EIOPA) to the Insurance and Reinsurance Stakeholder Group (IRSG) and Occupational Pensions Stakeholder Group (OPSG).

She is also the International Engagement Board member of the Chartered Insurance Institute. Pauline is a Fellow of the Chartered Insurance Institute and holds a Bachelor of Science honours degree in Chemistry and Biology from the University of Malta.

She is a part-time academic and has delivered lectures in financial services including wealth management, life assurance, financial planning, portfolio management and pensions since 1992 in countries such as Bahrain, Oman, India and Malta. She is currently a visiting lecturer at the University of Malta.

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Professional Qualifications from The Chartered Insurance Institute

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Certificate in Insurance and Financial Services

For those candidates working in financial advice and insurance, or aspiring to work in both, the CII offers a dedicated study pathway which comprises existing Award qualifications and results in the completion of the Certificate in Insurance and Financial Services.

The Certificate in Insurance and Financial Services is a core qualification providing candidates with solid grounding across a broad range of areas in the financial services industry.

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- W01 Award in General Insurance (compulsory unit)
- W04 Award in Customer Service
- AWB Award in Bancassurance OR
- AWF Award in Financial Planning
- AWP Award in Investment Planning

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which can be used towards further
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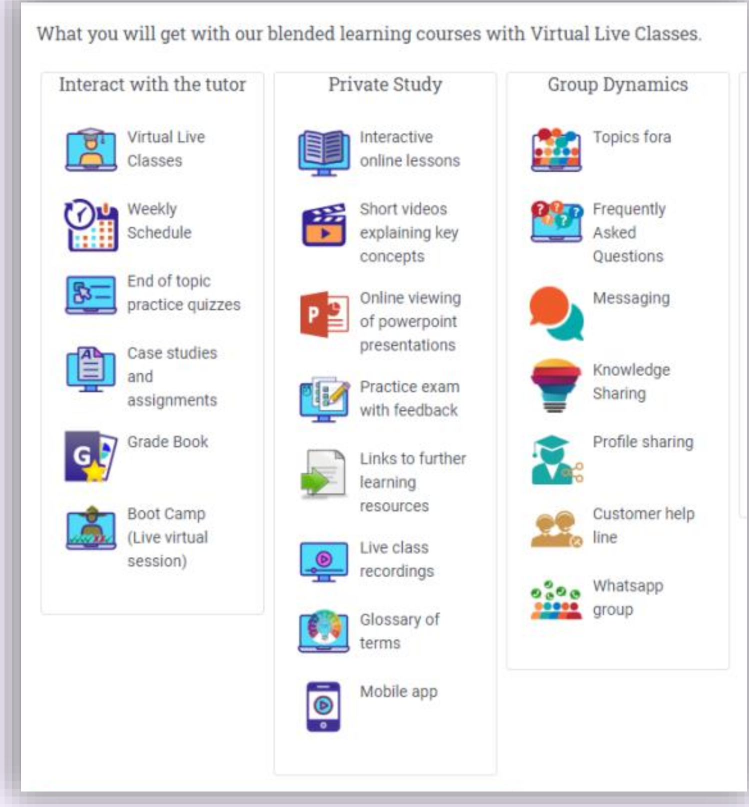
Online Remote Invigilation or any PSI testing centre
60—120 minutes, 70% Pass mark

CII Award
Each Award is a single-unit qualification



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SUMMARY OF LEARNING OUTCOMES

W01 Award in General Insurance

- Understand the nature and main features of risk and insurance
- Know the structure and main features of the insurance market
- Understand the main legal principles governing insurance contracts
- Understand the main regulatory and legal principles applicable to the transaction of insurance business
- Know key aspects of ethics, corporate governance and internal controls

W04 Award in Customer Service

- Know how to fulfil customer requirements in the insurance sector .
- Understand the importance of customer feedback to improve service in the insurance sector
- Understand the importance of good communication to maintain and build client relationships in the insurance industry
- Know how to deal with conflict within an insurance environment
- Understand the importance of keeping accurate and confidential records when dealing with customers
- Know how to manage own workload and time to meet business requirements and timescales
- Know how to work with others to achieve team and organisational objectives
- Understand the sales process
- Know how to increase sales activities

AWB Award in Bancassurance

- Know the main elements of the financial services and insurance industry as it relates to the bancassurance sector
- Understand the main insurance products
- Understand savings and investment products
- Understand retirement planning products
- Understand the importance of the client fact find and how to identify client needs
- Understand what constitutes good and ethical client practice

AWF Award in Financial Planning

- The client's needs
- The fact-finding process
- Good practice
- Protection products
- Savings and investment products
- Pension products

AWP Award in Investment Planning

- Main macro-economic factors that impact upon investment returns;
- Cash deposits, government securities and corporate bonds;
- Equity-based investment and property investment;
- Collective investment products and alternative investments;
- The risks faced by investors and the importance of asset allocation.