MFA

Master Financial Advisor

In collaboration with

LIMRA

Hosted by

TTAIFA

TRINIDAD AND TOBAGO ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS

LIMRA's Master Financial Advisor Designation

Elevate Your Financial Advisory Expertise Across 3 Comprehensive Levels

The MFA Series equips financial advisors with the skills, knowledge, and confidence to excel in the financial services industry. The program is divided into three levels, each focusing on a critical phase of an advisor's professional journey.

MFA Level 1: Building a Strong Foundation

In this foundational level, learners develop core competencies that lay the groundwork for building a successful practice and delivering trustworthy value to clients.

- Transition to the mindset of a financial advisor, understanding the role of advising in financial security.
- Commit to ethical practices, sound process planning, and effective client prospecting.
- Master needs-based selling: identifying, quantifying, and addressing clients' needs.
- Build long-term client relationships by presenting recommendations, handling objections, and closing business.

MFA Level 2: Putting Clients First

Learners build on their foundation by refining their skills in client management and practice development.

- Define and share your professional vision with a team.
- Implement performance improvement processes.
- Strengthen business-building strategies through effective planning, problem-solving, and delegation.
- Lead high-performing teams to ensure sustained success.

MFA Level 3: The Business Advisor

In this advanced level, learners shift their focus to advising businesses, mastering new competencies to serve corporate clients.

- Learn business fact-finding and risk evaluation.
- Develop tailored solutions for business prospects and cultivate long-term business relationships.
- Unlock the full potential of your advisory practice.

About the Instructor

Michelle Havelock - RFC, MBA

Senior Director, Member Relations and Development
Caribbean LIMRA Talent Solutions International

Michelle Havelock is the Senior Director of Member Relations and Development for LIMRA and LOMA in the Caribbean. She holds the prestigious designations of Registered Financial Consultant (RFC) and a postgraduate degree in Business Administration (MBA).

With over three decades of experience in the financial services industry, Michelle has built a proven track record of success. Early in her career, she qualified for the coveted Million Dollar Round Table (MDRT), a testament to her exceptional skills and dedication. Her expertise in training and development has had a profound impact on many leaders and advisors throughout the Caribbean region.

Michelle's career journey is a testament to her versatility and determination. She transitioned from a banker to an insurance sales representative, and eventually to leadership roles in various fields such as Business Development, Recruitment, Selection, Learning & Development, and Customer Retention.

Training Experience

Michelle is a certified professional trainer, facilitator, and moderator. Michelle shares valuable insights and guidance on:

- Leadership and Team Building
- Recruitment & Selection
- Manpower & Business Retention
- Learning & Development
- Performance Management
- Strategic Business Management
- Networking and Relationship Building
- Innovation and Problem-Solving

ABOUT US:

Trinidad and Tobago Association of Insurance & Financial Advisors (TTAIFA) provides education for Insurance & Financial Advisors in Trinidad & Tobago.

Through a frame work of cooperation with LIMRA the Association has provided open enrollment program delivery and facilitation services.

TTAIFA is also in the process of introducing new relevant programmes all in the continuing process of better educating and certifying students.

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