

Trevor Goodbun

Career Profile

Key Skills and Attributes

- An ability to bridge technical and practical issues and explain in a way people understand.
- A proven track record of applying regulatory requirements in a business effective manner.
- A thorough and current understanding of the FSA's requirements.
- An understanding of the day to day practicalities of running a FSA regulated business through the direct involvement in an IFA practice.
- A total commitment to achieving the client's objectives.

"In 20 years working in financial services no one has explained complex issues as well as Trevor"

"I appreciate the number of issues you have taken care of ... I suspect most of it was beyond the usual consultant job description."

The Practical Experience

Consultancy

My aim with any consultancy task is to create solutions that will work for the business when I have gone. For regulatory work I place great emphasis on going back to the source documentation rather than relying on opinion and hearsay. Wherever possible I match existing business processes to regulatory requirements. Recent examples include:

- Creation of a development programme to enable pension specialists to attain, maintain and improve competence. The task included the creation of a clear career path with as much emphasis on interpersonal skills as technical knowledge.

Outcomes included the creation of an outcomes based competency framework linked to the existing performance management process and an extensive learning syllabus.

- Design of a General Insurance Training and Competence Scheme for High Street Bank. The overall approach was a business as usual (as opposed to one off event) aligning existing processes to regulatory requirements rather than create new ones.

Outcomes included; the scheme itself, training materials and mechanisms for delivering training, sales process and supporting documentation, assessment processes, an MI System and a supervisor training programme.

- Editor General Insurance Web Site. I edit a general insurance web site sponsored by a major UK publisher. The job includes; providing regular updates and comment, an individual response service answering specific enquires, and "How to" guidance on a wide range of subject ranging from client money to sales process.

Training Design

My approach when designing training material is to create material that is easily understood and has a practical application. Recent examples include:

- The design of case study scenarios and testing material for to enable pension specialists to prove competence on a initial and ongoing basis. The case studies placed a major emphasis on accuracy and realism, utilised an Excel based system to ensure consistency and enable reproduction of a full range of supporting documentation. Testing materials included 200+ multiple choice questions all linked a learning syllabus.
- Design of web based general insurance material for various clients. Subjects include client money, conflicts of interest and RMAR completion. Emphasis is on translating FSA requirements into plain English and practical guidance to enable student to apply what they have learned.
- Design of management skills programme to enable branch managers to train and supervise staff selling GI on a secondary basis. As well as supervisory skills a full range of supporting training and assessment material was designed.
- Design of highly realistic role-plays to enable acquisition and improvement of the actual skills used in the work place for specialist advisers. Role-plays use pictures to help the person playing the customer visualise the role and reproduce actual documents to create a high level of realism.

Training Delivery

Whenever delivering training I take great strides to explain in a way that is real to those present, using real life examples and demonstrations wherever possible. I also place great emphasis on delivering the message the client requires rather than a personal opinion.

Subjects I have delivered include:

- First and second level supervisor training
- Point of sale, classroom training and live coaching
- AFPC and FPC revision workshops
- Induction training for financial consultants
- NLP based selling skills

The pieces of paper

I am a Chartered Financial Planner and hold the following qualifications:

- Associate Chartered Insurance Institute
- Advanced Financial Planning Certificate
 - G10 Taxation and Trust
 - G20 Personal Financial Planning
 - G30 Business Financial Planning
 - G60 Pensions
 - H15 Supervision and Sales Management
 - K10 Retirement Options
 - K20 Retirement Investment
 - CF9 Pensions Simplification
- Insurance Foundation Certificate (General Insurance)
- Assoc CIPD (Chartered Institute of Personal Development)

Where to find me

Aptus Training
63 New Road
Hethersett
Norwich
NR9 3HJ

T: 01603 814129
F: 01603 814106
E: Trevor@aptustraining.co.uk