

How to help when your client isn't ok



Money and all things financially related can be mentally and emotionally taxing for your clients and your staff. The importance of learning how to assist an individual with mental health crises/issues has never been needed more. With today's regulatory obligations, it is critical not only for financial advisors to recognize when a client is mentally unwell but also to ensure that they are taking appropriate steps to mitigate any financial improprieties resulting from poor mental health and bad decision-making.

This course was designed utilizing the Canadian Mental Health Commission's mental health first-aid course that has been tailored specifically to the unique requirements that financial advisors have when dealing with their clients. Delivery can be in-person or virtual.

By the end of this 3-hour course, you will;

- Recognize mental health issues, triggers, or symptoms,
- Learn and apply skills to assist an individual requiring mental health first aid, and
- Reduce your personal and professional risk.

The course outline is as follows:

Introduction

Why are we talking about this?	This section will address “why” this course is important for financial services professionals.
What is mental health?	This section will define mental health and why it is important to have “good mental health.”
Mental health first-aid	This section identifies and outlines the steps in the model, with tools and tips for working through each step.
Putting it all together	Practice working through the mental health first-aid process.
Wrapping up	

CE Credits: 3.5 CP/PM IIROC