

Continuing Professional Development Certificate

Insurance Institute of London lecture held on
Tuesday 8 October 2013

Given by
Amanda Chapman, Partner, Cripps, Harries & Hall
“Legal Firms and advisers working in harmony.....some practical
examples of collaborative advice at work”

Amanda Chapman discussed how lawyers traditionally worked with financial advisers, which included safeguarding their own interests on many aspects of the client / lawyer relationship. She suggested that most clients today challenge the old style client /lawyer relationship and lawyers have needed to adapt to this change.

However, Amanda indicated that the growing pressures of industry challenges also provided opportunities to work with a more team based approach to client matters. The consequences of this would be an improved lawyer / financial adviser relationship which would be beneficial to the client and thereby maintenance of fee income. Amanda discussed key areas where lawyers and financial advisers should be working closely, and highlighted some case studies to provide working examples of how and when opportunities can be identified.

By the end of this lecture members will have gained insight into:

- How lawyers approach client matters
- How lawyers and financial advisers should work together
- Industry pressures/challenges



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This lecture and podcast count as 45 minutes of CPD and can be included as part of your CPD requirement should you consider it relevant to your professional development needs. It is recommended that you keep any evidence of the CPD activity you have completed and upload copies to the recording tool as the CII may ask to see this if your record is selected for review.