AI IN ADVICE CERTIFICATE
COURSE OUTLINE

Shaping the future of advice

www.financialadvice.nz

Overview

The adoption of Artificial Intelligence (AI) in Financial Advice isn't a hypothetical concept for tomorrow - it's happening today.

Research by Financial Advice New Zealand and the Financial Planning Standards Board in 2025 revealed that 78% of financial advisers believe AI will help them better serve their clients. The use of AI tools by wealth management practitioners is no longer a competitive advantage – it's a necessity.

Making sense of how to get started with embedding AI tools into your professional practice can be confusing. The AI in Advice Certificate delivers an actionable, bottom-up learning experience enabling financial advice professionals to accelerate their understanding of how to implement the latest AI-powered technology directly into their practice.

International Faculty

Financial Advice New Zealand presents global award winning AdviceTech innovator, Founder & CEO of IFAAcademy, Panos Leledakis, as the international faculty for the AI in Advice Certificate.

In New Zealand, Panos Leledakis was a visiting fellow for the 2025 National Adviser Conference delivering a mainstage plenary and Modern Financial Adviser masterclass scoring a perfect 5/5 for relevance and value by financial advisers.

Our first AI in Advice Certificate course, facilitated by Panos, delivered exceptional participant satisfaction, reflected in a Net Promoter Score of 91.

Programme Structure

The AI in Advice Certificate is structured as a 14-module executive short course designed for financial advisers, delivered through a blended learning model that combines live immersive experiences, online interactive webinars, and applied practice development. Each module is designed to build capability and technical fluency in AI tools, systems, and applications tailored to the financial advice profession.

- **Weekly Executive Workshops**
  Fourteen interactive online sessions delivered by international faculty and industry experts. Each workshop focuses on a specific AI capability, with direct application to financial advice, client engagement, marketing, and business operations.
- **Applied Practice Development**
  Every module includes hands-on exercises, simulations, and implementation tasks designed to embed learning into real-world advisory practice. Assessments include multiple-choice questions, short-answer reflections, and practical implementation tasks.
- **Global Faculty & Peer Learning**
  Participants engage with international thought leaders and join a New Zealand-based Community of Practice, fostering peer-to-peer learning and collaboration.

What You Will Achieve

- **Certificate of Completion**
  Upon successful completion of the full programme, participants receive the AI in Advice Certificate. Completion means:
  i. attendance of at least 80% of the topics 1,2,3,5,6,7,8,10,11,12,13, and 14 (topics 4 and 9 are optional workshops) via the webinars or online e-modules
  ii. the submission of a content assignment
  iii. a pass mark of at least 70% in the final assessment.
- **Continuing Professional Development Recognition**
  Accredited by Financial Advice New Zealand, the programme contributes up to 30 CPD hours toward your Professional Development Plan (PDP). The CPD hours will be based on the number of modules you complete plus 2 hours for the assignment and assessment.

Why Advisers Should Enrol – Evidence-Based Insights

Global research by the Financial Planning Standards Board (FPSB) reveals the transformative impact of AI on the advice process[1]:

78% of financial planners believe AI will help them better serve clients

AI enhances client communications, data collection, and risk profiling - enabling advisers to deliver more personalised and efficient advice.

60% believe AI will improve the quality of financial advice

By automating routine tasks and surfacing deeper insights, AI empowers advisers to focus on strategic decision-making and client relationships.

41% of advisers already use AI for client communications

This includes onboarding, engagement, and follow-ups - streamlining the advice process and improving client experience.

Your Peer Feedback

Thank you for delivering an outstanding course. It has been genuinely exceptional. Panos brings brilliance and clarity to the material. His passion, expertise, and commitment to raising professional standards are evident throughout. The content is practical, relevant, and immediately valuable. – ***Dr. Roger Spiller***

Where do I start! The amount of information Panos packs into this course is absolutely phenomenal and yet somehow, he makes it feel completely manageable. He knows his subject inside out and delivers it with so much enthusiasm and excitement that you almost forget you're learning cutting-edge technology. As Panos says — it's a marathon, not a sprint. So, my advice? Sign up, show up, and dive in. The world is moving fast, and AI isn't waiting for anyone. – ***Sue Mihakis-Tierney***

Thanks Panos you have been an awesome tutor throughout this course, and I have learnt so much to date. Even learning how to use AI in day-to-day life has also been great. I would never have been able to master this by myself. – ***Melanie Robertson***

[1] FPSB's Impact of AI on Financial Planning global research 2025

AI in Advice Certificate – Syllabus

This syllabus outlines the 14-module structure of the AI in Advice Certificate, designed to equip financial advisers with practical, hands-on expertise in AI tools, systems, and strategies. Each module includes a clearly defined Learning Outcome and Applied Practice Development, ensuring participants can immediately implement what they learn into their professional environment.

Topic 1: Prompt Engineering & LLM Mastery

Learning Outcome

Participants will master prompt engineering to unlock the full potential of Large Language Models (LLMs) such as ChatGPT, Copilot, Gemini, and Claude. This skill will transform generic AI outputs into high-impact insights tailored to client scenarios, research, and communication - driving productivity, trust, and ROI.

Applied Practice Development

- Write, test, and refine prompts for real-world advice scenarios
- Apply advanced prompting techniques to prospecting and client engagement

Topic 2: Local LLMs, Custom Chatbots & NFC Integration

Learning Outcome

Participants will learn to deploy local LLMs for privacy-compliant AI solutions, build custom chatbots and voice agents, and integrate NFC technology to deliver 24/7 client service and memorable digital experiences.

Applied Practice Development

- Build a custom chatbot and voice agent using 11Labs and Heygen
- Set up NFC cards for client engagement
- Create an AI clone avatar for automated onboarding

Topic 3: AI Productivity Tools & Browser Extensions

Learning Outcome

Participants will identify and implement the most effective AI tools and browser extensions for financial advice, including meeting analysis, policy comparisons, and client simulations - streamlining operations and enhancing service delivery.

Applied Practice Development

- Record and analyse a mock client meeting using Descript, Copilot or Otter.ai
- Use AI agents for real-time policy comparisons and role-play simulations

Topic 4: Implementation Workshop

A live interactive workshop with Panos to provide an open forum to review the first three topics. The workshop will:

- Answer your questions on content from topics 1 – 3
- Address roadblocks to implementation
- Provide a forum for peer sharing of success stories

Topic 5: AI-Enhanced Content Marketing

Learning Outcome

Participants will develop a scalable content strategy using AI to produce blogs, videos, and social posts tailored to client personas—building visibility, trust, and brand authority.

Applied Practice Development

- Create 30 days of content in under an hour
- Repurpose one idea into multiple formats (post, video, email)

Topic 6: Lead Generation via AI-Powered Content

Learning Outcome

Participants will build automated lead funnels using AI-generated content, landing pages, and digital assets—turning visibility into inbound lead flow and client acquisition.

Applied Practice Development

- Build a complete lead generation funnel
- Create personalised ebooks, quizzes, or checklists for niche audiences

Topic 7: Social Media Strategy – Part 1

Learning Outcome

Participants will design a high-impact social media strategy using AI for scheduling, optimisation, and automation—positioning themselves as thought leaders and attracting ideal clients.

Applied Practice Development

- Design a 7-day content sprint
- Automate posts with AI-generated captions and hashtags

Topic 8: Social Media & Lead Generation – Part 2

Learning Outcome

Participants will convert social media engagement into qualified leads using AI-powered DM flows, automated follow-ups, and targeted campaigns.

Applied Practice Development

- Set up a lead-generating DM sequence
- Use Meta AI tools for targeted and retargeted campaigns

Topic 9: Implementation Workshop

A live interactive workshop with Panos to provide an open forum to review the previous 4 topics. The workshop will:

- Answer your questions on content from topics 5 – 8
- Address roadblocks to implementation
- Provide a forum for peer sharing of success stories

Topic 10: Canva Masterclass for Financial Advisers

Learning Outcome

Participants will master Canva's AI features to create professional-grade visuals, presentations, and marketing assets - eliminating reliance on external designers.

Applied Practice Development

- Create a branded visual identity pack
- Design three high-converting visuals for a campaign

Topic 11: CapCut Masterclass for Video Marketing

Learning Outcome

Participants will produce and edit professional videos using CapCut and AI tools - enhancing client communication, marketing reach, and brand impact.

Applied Practice Development

- Produce a 30-second promotional video
- Repurpose webinar clips into short-form reels

Topic 12: Email Marketing with AI

Learning Outcome

Participants will design and execute segmented, automated email campaigns using AI - driving engagement, nurturing leads, and increasing conversions.

Applied Practice Development

- Set up a 3-part welcome sequence
- Launch and test two AI-generated campaigns

Topic 13: Build Your Own Digital Studio

Learning Outcome

Participants will set up a professional digital studio using budget-friendly tools - enhancing online meetings, webinars, and content creation.

Applied Practice Development

- Build a studio setup using OBS and green screen tools
- Create branded virtual environments for client interactions

Topic 14: Automation Systems & Business Planning

Learning Outcome

Participants will design a scalable, AI-powered business model—automating workflows, improving efficiency, and enabling growth through digital systems.

Applied Practice Development

- Map out tasks for automation
- Build a 6-month business automation roadmap using tools like Zapier and Make.com

Content Assignment and Online Assessment

Participants who wish to receive the AI in Advice Certificate of completion are required to:

- Undertake the online assessment conducted by the IFA Academy consisting of 12 multiple choice questions and 2 written answer questions
- Create and submit one piece of AI generated content. Details will be provided during the course.

Study Plan

The study plan is designed to accommodate the schedules of financial advisers while delivering a rigorous and practical learning experience. The programme runs over 14 weeks, with a combination of webinars, live sessions, self-paced study, and applied practice.

Module	Topic	Delivery Format	Time Commitment	Accredited CPD Hours
Topic 1	Prompt Engineering & LLM mastery	Webinar	2 hours	2
Topic 2	Local LLMs, Chatbots & NFC's	Webinar	2 hours	2
Topic 3	AI productivity tools & browser extensions	Webinar	2 hours	2
Topic 4	Practice workshop: implementation	Live online workshop	2 hours	2
Topic 5	AI-enhanced content marketing	Webinar	2 hours	2
Topic 6	Lead generation via AI content	Webinar	2 hours	2
Topic 7	Social media strategy – Part 1	Webinar	2 hours	2
Topic 8	Social media & lead conversion – Part 2	Webinar	2 hours	2
Topic 9	Practice workshop: implementation	Live online workshop	2 hours	2
Topic 10	Canva masterclass for advisers	Webinar	2 hours	2
Topic 11	CapCut for video marketing	Webinar	2 hours	2
Topic 12	Email marketing with AI	Webinar	2 hours	2
Topic 13	Build your digital studio	Webinar	2 hours	2
Topic 14	Automation systems & business planning	Webinar	2 hours	2
Final Certification	Content assignment and online assessment	Online	2 hours	2
		Total	**30 hours**	**30 CPD**

Ready to start?

Register now and gain the skills to future-proof your practice and elevate your role as a Modern Financial Adviser.

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