

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 that enables 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.

Programme Structure

The AI in Advice Certificate is structured as a 12-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.

- **Immersion Masterclass**

A foundational, in-person or online experience focused on mastering prompt engineering and LLMs. This session sets the tone for the course and equips participants with the core skillset required to leverage AI effectively.

- **Weekly Executive Workshops**

Eleven live, 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.

- **Flexible Pathways**

Advisers may attend the Immersion Masterclass without committing to the full certificate. If they choose to continue, the masterclass tuition fee is fully refundable against the certificate fee - offering the best of both worlds for all learning styles.

What You Will Achieve

- **Advanced Standing**
Completion of the Immersion Masterclass provides advanced standing and credit toward the full certificate.
- **Certificate of Completion**
Upon successful completion of the full programme, participants receive the AI in Advice Certificate and a digital badge credential.
- **Professional Development Recognition**
Accredited by Financial Advice New Zealand, the programme contributes 25 CPD hours toward your Professional Development Plan (PDP).

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 process¹:

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.

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

AI in Advice Certificate – Syllabus

This syllabus outlines the 12-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.

Immersion Masterclass – 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: 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 5: 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 6: 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 7: 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 8: 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 9: 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 10: 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 11: 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 12: 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

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 12 weeks, with a combination of live sessions, self-paced study, and applied practice.

Module	Topic	Delivery Format	Time Commitment	Accredited CPD Hours
Live immersion masterclass (Foundation course)	Prompt Engineering & LLM Mastery	In-person (Auckland, Wellington, Christchurch)	3 hours	3
Repeat online masterclass (Foundation course)	Prompt Engineering & LLM Mastery	Live Webinar	2 hours	2
Topic 2	Local LLMs, Chatbots & NFC	Live Webinar	2 hours	2
Topic 3	AI Productivity Tools & Browser Extensions	Live Webinar	2 hours	2
Topic 4	AI-Enhanced Content Marketing	Live Webinar	2 hours	2
Topic 5	Lead Generation via AI Content	Live Webinar	2 hours	2
Topic 6	Social Media Strategy – Part 1	Live Webinar	2 hours	2
Topic 7	Social Media & Lead Conversion – Part 2	Live Webinar	2 hours	2
Topic 8	Canva Masterclass for Advisers	Live Webinar	2 hours	2
Topic 9	CapCut for Video Marketing	Live Webinar	2 hours	2
Topic 10	Email Marketing with AI	Live Webinar	2 hours	2
Topic 11	Build Your Digital Studio	Live Webinar	2 hours	2
Topic 12	Automation Systems & Business Planning	Live Webinar	2 hours	2
Total			25 hours total	25 CPD hours