



ACCREDITED TRAINING PROVIDER

Advanced International Wealth Management: Applications In Financial Advice & Management

A 3-day training event

In this increasingly complex economic environment it has never been harder to be a wealth manager and provide reliable appropriate advice. The range of assets available is increasing while some familiar investment products may no longer remain suitable. At the same time regulatory expectations and compliance requirements have also increased.

This qualification explores the wide range of assets and investment products available in the market at an advanced level. You will gain the knowledge to assess a client's current financial position, make suitable investment recommendations, and respond appropriately to the changing needs of the client and circumstances of the market. It covers the macro-economic context of investment advice and planning, the main asset classes, the main investment products, identification, measurement and assessment of investment risks and returns, portfolio planning, construction, review and maintenance and the provision of investment.

Course Objectives

The purpose of this three-day course is to equip delegates with the necessary knowledge and exam techniques to prepare them for the exam for this qualification.

Who should attend?

This qualification is appropriate for anyone providing wealth management investment advice, whether they wish to take the certificate from the CISI or not. It also is designed for international candidates working in Private Banking and wealth management roles

Knowledge prerequisites:

It would be beneficial for candidates to first complete the **Level 3 International Certificate in Wealth & Investment Management** before taking this Advanced Certificate.

Our unique 3-day classroom training course features:

- Content-rich study materials
- Up-to-date and industry relevant case studies
- In-depth analysis of course topics
- Smaller class sizes which focus more on personal attention & expert-delegate interaction
- An experienced, expert practitioner-trainer with real industry track-record & available for delegate Q&A for up to 90 days to help in exam preparation following the course.

Methodology

The expert trainer will use slides, case studies, exercises and lead workshop-style group discussion to engage the delegates in practical learning and understanding. The trainer remains available to delegates for Q&A related to the course topic for 90 days following the course dates.

Training Type: *Live, in-person, classroom*

Learning Level: *Intermediate*

Field of Study: *Financial Planning & Advice*

This training course is scheduled for:

London UK, 3 days

May 13 - 15, 2019

November 25 - 27, 2019

The price per delegate for this 3-day programme is £3,745.00

(+ UK VAT when applicable)

1:1 training course available at 2x per delegate price!

For an in-house training option, alternative dates and locations are available.

We are happy to add extra content to the programme to meet additional requirements from your company. Please contact us for further information.

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Course Outline

Session 1: Cash and Money Markets

- Cash Deposits
- Money Market Funds

Session 2: Bonds

- Characteristics and Types of Bonds
- Risk and Return
- Bond Analysis

Session 3: Equities

- Characteristics and Types of Equities
- Risk and Return
- Equity Analysis

Session 4: Other Investments

- Foreign Exchange
- Property
- Derivatives

Session 5: Collective Investments

- Open ended Funds
- Exchange Traded Funds
- Closed ended Funds
- Life Assurance based investments
- Alternative Investments
- Fund selection and fund provider research

Session 6: Financial Advice

- Investment Advice Process
- International Considerations
- Trusts and Foundations

Session 7: Portfolio Management

- Risk and Return
- Asset Allocation
- Investment management
- Evaluating investment performance

Course schedule:

Full day classroom training
09:30 – 17:00



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Registration & Payment details

Please mark **X** in the box and complete the form with BLOCK LETTERS

Dates:

May 13 - 15, 2019

November 25 - 27, 2019

Course Fee (per person):

GBP £3,745.00 (+UK VAT when applicable)

Email* _____

First name* _____

Last name* _____

Job title / Position _____

Department _____

Company Name _____

Company Address _____

City _____

Postcode _____ Country* _____

Telephone (direct)* _____ Telephone (main) _____

Approving Manager _____

Training Manager _____

CISI Certificate & Diploma Candidates

Please register, purchase your CISI workbook and online learning tools, and arrange to sit the exam at a testing centre directly with the professional body via www.CISI.org.

Please tick that box if you don't want to be subscribing to the Global Risk Update magazine.

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Terms and Conditions All cancellations must be received in writing 20 working days prior to the start of the course with acknowledgement from Risk Reward. Course fees must therefore be paid in full if a cancellation occurs within 20 working days of the start of the course. We are always happy to welcome a replacement onto the course. Kindly send us written notification of your replacement by email, fax or telephone. Written cancellations received 20 working days or more before the start date of the course receive a full refund less a charge of 20%. For any written cancellation requests that reach us less than 20 working days before the event, no refunds will be given. Risk Reward reserves the right to the final decision if any dispute arises.

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Signature

Date