



ACCREDITED TRAINING PROVIDER

Fundamentals of Financial Services

This qualification is an important first step in developing the essential basic knowledge required for working in financial services. You will learn about the industry and commonly used financial products, such as shares, bonds and insurance and it will provide you with an understanding of financial terminology

Course Objectives

The purpose of this two 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 new or junior employees working in financial services. It is also appropriate for school leavers who are considering a career in finance.

Our unique 2 day classroom led training course includes:

- Content rich PowerPoint slides
- Up-to-date and relevant case studies
- Smaller class sizes which focus more on teacher/student interactions
- An expert trainer with practical industry experience

Progressive study pathways:

- This entry level qualification provides a solid foundation for new entrants to the financial services industry creating a platform to allow them to tackle the higher level CISI qualifications



Course Director: Dennis Cox is a leading financial services risk management

specialist serving banks, regulators and financial institutions globally, with a career encompassing HSBC, Prudential Portfolio Managers, Ernst & Young, BDO Binder Hamlyn and Arthur Young.

Dennis has in-depth knowledge, expertise and practical know-how of Risk management, Bank Internal Audit, Compliance & Financial Crime/Cyber Security in addition to Wealth Investment Management, Financial Markets (Bonds, Securities), Asset & Fund Management, and UK, USA & international Regulation.

He sees risk management as a driver for organizational change in banking, and provides senior level risk advice to major financial institutions globally. His published works on Risk Management, Audit and Financial Crime Deterrence are considered industry standards.

Advanced Preparation: None

Training Type: Classroom

Learning Level: Entry level

Field of Study: Financial markets

This training course is scheduled for:

London UK, 2 days

February 26 – 28, 2018

November 12 – 14, 2018

The price per delegate for this 2-day programme is £1050

(+ UK VAT when applicable)

1:1 training courses 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.

www.riskrewardlimited.com

Risk Reward Ltd 47 Limeharbour, 2nd Floor, London E14 9TS, UK

Tel: +44 (0)20 7638 5558

CISI@riskrewardlimited.com

UK Companies House # 434 6234.



ACCREDITED TRAINING PROVIDER



Fundamentals of Financial Services

Detailed Course Outline

Session 1: Ethics and Integrity in Financial Services

- Ethics and Integrity

Session 2: Introduction - saving and borrowing

- Savers/Borrowers

Session 3: Banking

- Banking

Session 4: Equities

- Equities

Session 5: Bonds

- Bonds

Session 6: Markets

- Markets

Session 7: Other Areas of Financial Services

- Fund Management
- Foreign Exchange
- Insurance
- Retirement Planning

Course schedule:

Full day classroom training
09:30 – 17:00



ACCREDITED TRAINING PROVIDER



Fundamentals of Financial Services (London)

Registration & Payment details

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

Dates:

February 26 - 28, 2018

November 12 - 14, 2018

Course Fee (per person):

GBP £1050 (+ 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 _____

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

Data Privacy & Update of Contact Details Risk Reward Limited is fully compliant with the Data Protection Act. The information you provide will be safeguarded by Risk Reward Ltd. We do not rent, sell or exchange your details to anyone without your consent. Your details are never given to third parties. If you wish to update your details, please email: info@riskrewardlimited.com with your OLD and NEW details. Please allow 10 days to see the changes take effect. Thank you.

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.

Copyright © 2002-2018 All rights reserved. Risk Reward Limited reserves the right to amend the course fees, terms, course agenda, speaker or venue should the need arise. All public courses are subject to demand.

Signature

Date

Examination policy:
You will need to book their examination and register for their membership directly through the CISI.
Candidates who are attending the training are advised to purchase the workbook from CISI.