



ACCREDITED TRAINING PROVIDER

# Fundamentals of Financial Services

A 2-day **Live Classroom or Virtual Delegate**

Training Event, London UK/12 CPE Credits

*The global financial services industry is among the top five sectors worldwide and functions as the enabling partner to all international and domestic commercial activity. Whether delegates are a seasoned professional, a new market entrant or an entrepreneur an essential understanding of how the financial services industry works is critical in contemporary life.*

This fast-paced 2-day course covers the essential knowledge of the financial services sector - it's types of players and their interrelationships, behaviors, products, services and regulation. Case studies and real-life examples will provide delegates with a practical understanding of financial terminology and key concepts.

#### Course Objectives

Participants will gain detailed knowledge about the industry and financial products, ranging from saving and borrowing, shares, bonds, fund management, foreign exchange and insurance to pensions with a focus on ethics and integrity in Financial Services.

#### Who should attend?

- New market entrants seeking to work in financial services
- Anyone interested in the financial service sector
- CISI Candidates to the **Fundamentals of Financial Services** certificate towards the **Introduction to Investment** qualification

#### Learning Methodology

Highly interactive expert-led discussions and case studies are supported by principles and theory using external reference materials and presentations delivered in a live classroom or via live video weblink.

#### Knowledge Prerequisites

None

#### Our unique 2-day live 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

**Advanced Preparation: None**

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

**Learning Level: 2**

**Introductory/Refresher**

**Field of Study: Financial markets**

**This 2-day training course is scheduled for:**

**London UK, 2 days**

February 24-25 2020

June 8-9 2020

November 9-10 2020

**The price per delegate for this 2-day programme is £1,995.00**  
(+ UK VAT when applicable)

**NEW** 1:1 training courses available at the per delegate price

**In-house training options, group discounts, alternative dates and locations are available worldwide.** 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](http://www.riskrewardlimited.com)

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# 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



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RISK REWARD  
GLOBAL BANKING & FINANCIAL SERVICES EXPERTS

## Fundamentals of Financial Services (London)

### Registration & Payment details

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

Dates:

February 24-25, 2020

June 8-9, 2020

November 9-10, 2020

#### Course Fee (per person):

GBP £1,995 (+ UK VAT when applicable) **Group Discounts are available**

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](http://www.CISI.org).

Please tick this box if you do not wish to receive our complimentary annual subscription to the **Global Risk Update** magazine.

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Signature

Date

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