



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 and internal audit 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 specialises his risk advisory services and lectures on the balance of risk management and the modernisation of internal audit and the auditing of compliance risk areas. He also addresses risk management as a driver for organisational change in banking, and risk-based bank internal audit. He is a specialist in risk and audit for bank departments and functions including credit, treasury, operations and accountancy issues related to the Basel Accord and the dynamics of changing regulation and business banking competitiveness

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

April 10 – 11, 2017

July 06 – 07, 2017

October 26 – 27, 2017

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

(+ UK VAT when applicable)

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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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

AM session 09:30 – 12:30

PM session 13:30 – 17:00



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Fundamentals of Financial Services (London)

Registration & Payment details

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

Dates:

April 10 – 11, 2017

July 06 – 07, 2017

October 26 – 27, 2017

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 _____

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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 £150. 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

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