



ACCREDITED TRAINING PROVIDER

International Certificate in Advanced Wealth Management

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 international candidates working in Private Banking and wealth management roles

Our unique 3 day classroom led training course features:

- 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 and prerequisites:

- This Advanced Certificate is the second step in CISI's **global wealth management pathway**.
- It is recommended that candidates first complete the **Level 3 International Certificate in Wealth & Investment Management** before taking this Advanced Certificate.
- Candidates who have passed the exam to this Advanced Certificate will be eligible to take the **Level 7 Chartered Wealth Manager Qualification**.



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: Yes

Training Type: Classroom

Learning Level: Advance

Field of Study: Wealth Mgt

This training course is scheduled for:

London UK, 3 days

May 14 - 16, 2018

November 26 - 28, 2018

The price per delegate for this 3-day programme is £1,995

(+ 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

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International Certificate in Advanced Wealth Management

Detailed 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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International Certificate in Advanced Wealth Management (London)

Registration & Payment details

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

Dates:

May 12 - 16, 2018

November 26 - 28, 2018

Course Fee (per person):

GBP £1,995 (+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.

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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

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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.