



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 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: Yes**

**Training Type: Classroom**

**Learning Level: Advance**

**Field of Study: Wealth Mgt**

**This training course is scheduled for:**

**London UK, 3 days**

February 27 – March 01, 2017

September 18 – 20, 2017

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

(+ 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.

[www.riskrewardlimited.com](http://www.riskrewardlimited.com)

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

**Tel: +44 (0)20 7638 5558**

**CISI@riskrewardlimited.com**

UK Companies House # 434 6234.



ACCREDITED TRAINING PROVIDER



# 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  
AM session 09:30 – 12:30  
PM session 13:30 – 17:00



ACCREDITED TRAINING PROVIDER



# International Certificate in Advanced Wealth Management (London)

## Registration & Payment details

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

Dates:

February 27 – 01 March, 2017       September 18 – 20, 2017

### 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

Payment Details

Invoice Me

BACS

Credit Card



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](mailto: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 £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.

Copyright © 2002-2017 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