



ACCREDITED TRAINING PROVIDER

International Certificate in Wealth & Investment Management

This qualification covers the essentials of financial planning, private client asset management, fund management, advisory functions and investment analysis from a global perspective. Our course will ensure that you understand the range of assets and investment products that are available in the market and find appropriate solutions to meet the investment, retirement and protection planning needs for your clients.

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?

It is an entry level 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 and a sample practice paper
- Smaller class sizes which focus more on teacher/student interactions
- An expert trainer with practical industry experience

Progressive study pathways:

- This certificate is the first step in CISI's **global wealth management** pathway and a prerequisite to the level 4 International Certificate in Advance Wealth Management.
- Passing the exam for this certificate will give you access to ACSI designatory letter after your name



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: Introduction
Field of Study: Wealth Mgt

This training course is scheduled for:

London, 3 days
May 21 - 23, 2018
October 22 - 24, 2018

The price per delegate for this 3-day programme is £1,395

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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Detailed Course Outline

Session 1: The Financial Services Industry

- The Purpose and Structure of the Financial Services Industry
- Macroeconomic Analysis
- Microeconomic Theory
- Financial markets

Session 2: Industry Regulation

- Financial Services Regulation
- Financial crime
- Corporate Governance

Session 3: Asset Classes

- Cash
- Bonds
- Property
- Equities
- Derivatives
- Commodities

Session 4: Collective Investments

- Investment funds
- Other investment vehicles

Session 5: Fiduciary Relationships

- Fiduciary Duties
- Advising Clients
- Determining client needs
- Taxation

Session 6: Investment Analysis

- Statistics
- Financial Mathematics
- Fundamental and Technical Analysis
- Yields and Ratios
- Valuation

Session 7: Investment Management

- Risk and Return
- Portfolio Construction Theories
- Investment Strategies
- Performance Measurement

Session 8: Lifetime Financial Provision

- Retirement planning
- Protection planning
- Estate planning, trusts and foundations

Course schedule:

Full day classroom training
09:30 – 17:00



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International Certificate in Wealth & Investment Management (Dubai)

Registration & Payment details

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

Dates:

May 22 - 24, 2018

October 22 - 24, 2018

Course Fee (per person):

GBP £1,395 (+ 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.