



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 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: Introduction

Field of Study: Wealth Mgt

This training course is scheduled for:

Dubai, 3 days

March 13 - 15, 2017

October 10 - 12, 2017

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

A 10% discount is available for returning candidates booking training courses along the International Certificate in Wealth and Investment Management Progressive study pathway.

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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UK Companies House # 434 6234.



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International Certificate in Wealth & Investment Management

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

AM session 09:30 – 12:30

PM session 13:30 – 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:

March 13 - 15, 2017

October 10 – 12, 2017

Course Fee (per person):

USD \$1,995

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

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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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