ACCREDITED TRAINING PROVIDER

RISK REWARD
GLOBAL BANKING & FINANCIAL SERVICES EXPERTS

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:

London, 3 days
January 23 - 25, 2017
June 05 - 07, 2017
October 02 – 04, 2017

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

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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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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RISK REWARD
GLOBAL BANKING & FINANCIAL SERVICES EXPERTS

International Certificate in Wealth & Investment Management (Dubai)

Registration & Payment details

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

Dates:

☐ January 23 - 25, 2017 ☐ June 05 - 07, 2017 ☐ October 02 – 04, 2017

Course Fee (per person):
GBP £1,395 (+ UK VAT when applicable)

Email*

First name*

Last name*

Job title / Position

Department

Company Name

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 CISI workbook.

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 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.

Signature Date

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

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