



ACCREDITED TRAINING PROVIDER

## International Wealth & Investment Management

A 3-day training event

Growing prosperity is increasing the demand for private banking services, whilst the turmoil in the financial markets demonstrates the need for robust and focused solutions to help clients withstand market volatility and preserve their wealth.

**International Wealth & Investment Management** covers the essentials of financial planning, private client asset management, fund management, advisory functions and investment analysis from a global perspective.

This 3-day interactive course provides a comprehensive high-level overview of financial planning, private client asset management, fund management, advisory functions and investment analysis from a global perspective.

Delegates will 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 clients. Taking a global perspective this essentials course is prime knowledge for those working in private banking and wealth management roles at all levels worldwide.

### Course Objectives

Participants will gain a high-level knowledge and an understanding of

- The **function of the financial services** industry, **macroeconomics analysis, microeconomic theory and financial markets**
- Financial services **regulation, financial crime and corporate governance**
- Cash, property, bonds, equities, derivatives and commodities
- **Investment funds** and other investment vehicles
- Fiduciary duties, **advising clients and determining client needs**
- Calculating statistics, financial mathematics, **fundamental and technical analysis, yields and ratios and valuations**
- **Investment services, investment funds**, other investment vehicles including structured investment funds, hedge funds, private equity, commodity funds and sukuk investments, **risk and return, portfolio construction theories, investment strategies and performance management**
- Retirement planning, protection planning, **estate planning and trusts, business tax, personal tax and overseas taxation**

### Who should attend?

- professionals already working in financial services seeking to diversify into private banking & wealth management
- staff working in private client asset management (discretionary portfolio management) and fund management
- new entrants to financial services (graduates)
- anyone who wants to develop an understanding of how to deliver private client and wealth management advice.
- CISI Candidates for the *International Certificate in Wealth & Investment Management Level 3*

Our unique 3-day classroom training course features:

- Content-rich study materials
- Up-to-date and industry relevant case studies
- In-depth analysis of course topics
- Smaller class sizes which focus more on personal attention & expert-delegate interaction
- An experienced, expert practitioner-trainer with real industry track-record & available for delegate Q&A for up to 90 days to help in exam preparation following the course.

### Methodology

The expert trainer will use slides, case studies, exercises and lead workshop-style group discussion to engage the delegates in practical learning and understanding. The trainer remains available to delegates for Q&A related to the course topic for 90 days following the course dates.

**Advanced Preparation: None**

**Training Type: Classroom**

**Learning Level 3:**

**Introduction**

**Field of Study: Wealth Management**

**This training course is scheduled for:**

**London, 3 days**

May 20 - 22, 2019

October 21 - 23, 2019

**The price per delegate for this 3-day programme is £3,145.00**

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

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## International Wealth & Investment Management

### 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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**RISK REWARD**  
GLOBAL BANKING & FINANCIAL SERVICES EXPERTS

# International Wealth & Investment Management

## Registration & Payment details

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

Dates:

May 20 - 22, 2019

October 21 - 23, 2019

### Course Fee (per person):

GBP £3,145.00 (+ 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

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Date

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### CISI Certificate & Diploma Candidates

Please register, purchase your CISI workbook and online learning tools, and arrange to sit the exam at a testing centre directly with the professional body via [www.CISI.org](http://www.CISI.org).