Innovative Training Solutions

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Wealth Management

Introduction:

Wealth management is one of the fastest growing sectors within the financial services industry. Global wealth has been rapidly increasing and is expected to grow at a steady pace in the years to come.

Wealth management is, however, increasingly a knowledge business, and one which requires professionals able to understand the individual needs of their clients and the increasingly complex financial products.

Students will be able to:

- Understand the basics of global economics and the impact on wealth generation as well as the risks to maintaining wealth.
- Examine the basics of client credit analysis, loan structures and regulations governing lending.
- Explore the basics of portfolio management using traditional asset classes.
- Identify appropriate risk and return parameters and how to explain asset allocation, diversifi cation, and portfolio performance to clients.
- Understand the purposes of derivatives and alternative investment products for clients.

Who should attend?

Wealth Managers, Customer Advisers, Financial Planners, Investment Advisers, Asset Managers and Relationship Managers etc.

Course outline:

Module 1: Introduction to the Wealth Environment

Module 2: Grow Wealth: Liquidity

Module 3: Grow Wealth: Asset Management

Module 4: Grow /Protect Wealth: Alternative Investments

Module 5: Grow/Protect Wealth: Derivatives

Module 6: Consultative Selling Skills to Investment Client

Course Duration:

5 Days: 30 Hrs