International Degrees Ltd

Financial Training Academy Courses

From the Heart of the World's Main Financial Centre

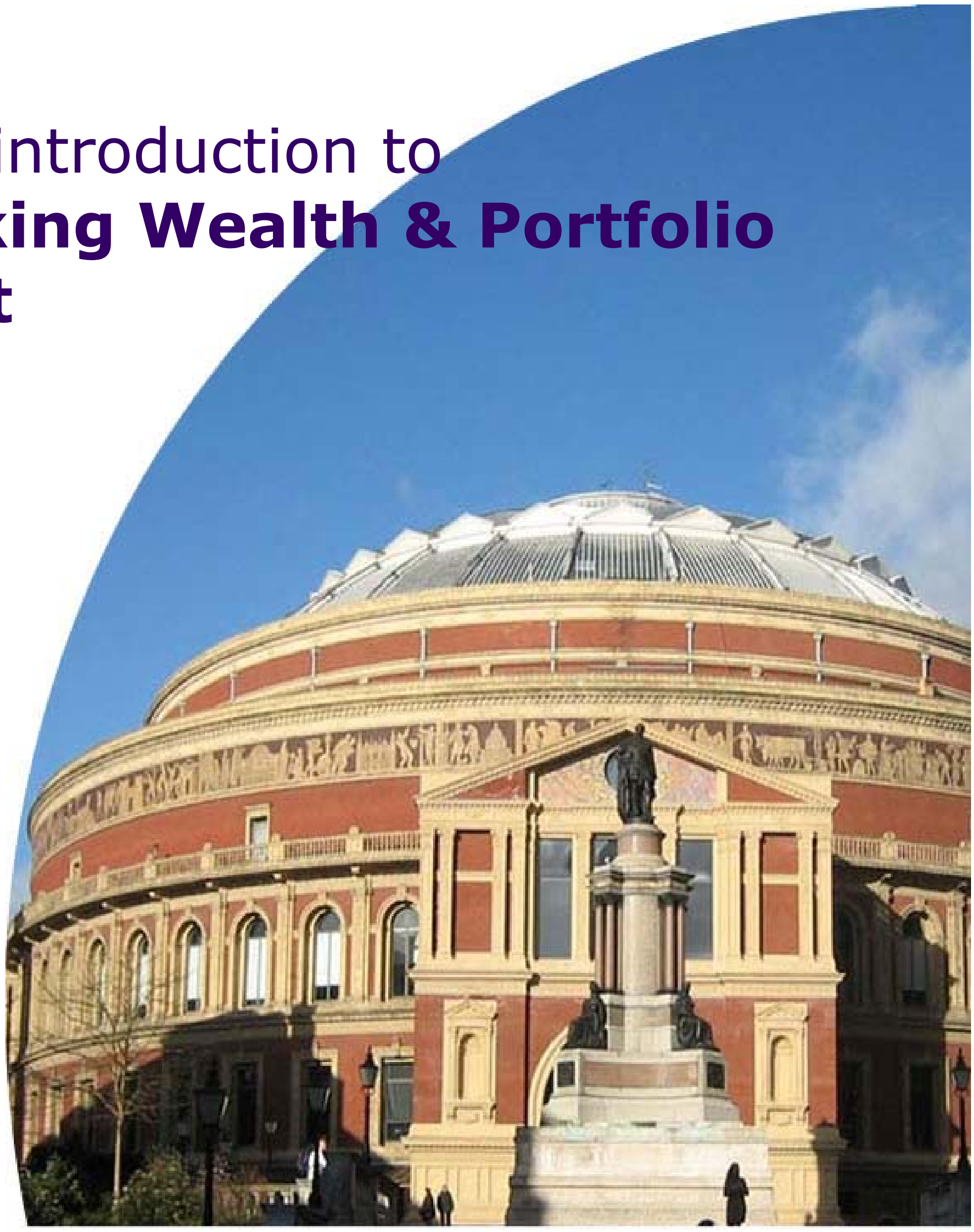
The Financial Training Academy Ltd

CerEPB
An enhanced introduction to **Private Banking Wealth & Portfolio Management**

Hands on, Tutor-led training at:

Bank,
City of London

3 Days



Including:
- · Asset Allocation and Portfolio Structure
- · Asset Allocation Rebalancing and Restructuring in Response to Market Moves
- · Investor Profiling
- · Portfolio Planning
- · Derivatives,
- · Hedge funds
- · Structured Products
- · Total Return Solutions for Private Banking Clients

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LOCAL CONTACT



The Financial Training Academy Ltd

Course Director

The lecturers for this training event will be selected from amongst the faculty of lecturers provided by Risk Reward Limited UK.

Course Description

This course offers an opportunity for staff to learn techniques used in private banking / private wealth management to equip themselves with the skills to formulate innovative strategies, improve their customer relationships and effectively manage their clients' wealth.

Learning Objectives

Upon the completion of this training event participants will have gained an;

- · Understanding and applying investor profiling
- · Asset allocation and portfolio structuring techniques
- · Structured products and solutions for private banking clients
- · Risk reduction and return enhancement opportunities and strategies

Who Should Attend

- · Staff entering Private Banking and Asset Management
- · Employees in legal and accountancy practices working with private bankers
- · Legal & Trust Staff
- · Branch staff and Credit Officers who need to understand the complementary nature of private banking services
- · Service Providers

Course Outline

DAY 1

- Investor Profiling

Plus:

Case Study: Investor Temperament Analysis
Case Study: Why Investors make systematic errors in their investment decision making
Case Study: Portfolio Planning Exercises

DAY 2

- New Approaches to Asset Allocation and Portfolio Structuring for Private Clients Applying the Principles of Modern & Post-Modern Portfolio Theory to Private Clients.
- Asset Allocation and Portfolio Structure
- Asset Allocation Rebalancing and Restructuring in Response to Market Moves

Plus:

Case Study: Post-Modern Portfolio Theory applied to Private Investors

DAY 3

- Derivatives, Hedge funds, Structured Products and Total Return Solutions for Private Banking Clients. The Demand for Total Return and Absolute Return Products by Private Clients
- Building Blocks of Financial Engineering for Private Bankers

Plus:

Case Study: Positioning Absolute and Total Return Products Appropriately

Practical Exercise: Designing simple structures to match a client's views and risk tolerances

3 Days
£600 per day*+ VAT
*Promotional Price