

CERTIFIED WEALTH MANAGER COURSE OUTLINE

Course	Certified Wealth Manager
Instructor	Certified American Academy Instructor
Descriptions	Building on classical concepts in portfolio theory, participants will learn more advanced applications as they apply to equities, bonds, or hedge fund strategies. Participants will learn to question and assess asset managers. Furthermore, you will practice how to break down and evaluate various structured products in order to give clients the best advice.
Durations	3 Days
Objectives	On completion of this segment, participant should be able to: • To define and implement portfolio Management, Financial Markets And Risk Management • To implement Wealth Management And Planning • To implement Management Accounting and Controlling • To develop Interpersonal Skills For Dealing With High- Net-Worth Individuals • To develop Marketing Programs For The Financial Industry
Target Audience	• Finance Managers • Risk Manager • Finance Staff • Investment Manager • Securities Manager

Course Descriptions

1. Portfolio Management, Financial Markets And Risk Management

Building on classical concepts in portfolio theory, you will learn more advanced applications as they apply to equities, bonds, or hedge fund strategies. You will learn to question and assess asset managers. Furthermore, you will practice how to break down and evaluate various structured products in order to give clients the best advice. Finally, you will gain insights into modern concepts of :

- Risk management.
- Portfolio management
- Investment policy and agreements Efficient-market theories
- Performance measurement
- Investment styles fixed-income management Structured products risk management and operational risk
- Hedge funds tax and insurance aspects
- Practical diversification possibilities

2. Wealth Management And Planning

The topic covers the special aspects of wealth management for high net-worth individuals and the comprehension of the major concepts underlying global laws and regulations related to wealth planning.

Also, major principles in domestic and international estate and tax planning and how to recognize opportunities for clients will be covered. Furthermore, suitable asset allocation techniques from an integrated perspective, taking finance, financial planning aspects, risk tolerance; lifestyle, life cycle, and estate planning into consideration will be discussed. In a complex wealth management situation, participants will be able:

- To integrate the advice given by various counsellors to help facilitate the optimal solution and clients' decisions.
- To conduct Financial planning and life cycle models for high- net-worth individuals
- To perform Asset allocation, client objectives and suitable financial decisions
- Integrated financial planning for entrepreneurs (including laws and taxes governing IPO's and divestitures)
- To perform International wealth planning for high-net-worth individuals (including trusts, foundations, estate planning, comparative tax laws, mobility and residence)

- To set Objectives and strategies of a family office

3. Management Accounting and Controlling

Develop the ability to apply modern controlling concepts concerning the profitability of products and customer segments. Understanding the workings of asset and liability management and how to judge the financial status of a company based on balance sheet and profit or loss that involves:

- Modern methods of cost calculation for products, services, processes, and clients Methods of internal cost allocation and their consequences
- Asset and liability management
- Balance sheet and profit and loss analysis Examples of existing cost calculations and their uses

4. Interpersonal Skills For Dealing With High- Net-Worth Individuals

Understanding the ethical concepts in wealth management based on different cultural backgrounds and different historical developments. Developing sensitivity towards codes of conducts in different cultures. Strengthening personal skills in handling demanding high-net-worth individuals both in business and in social settings, and how to improve your negotiation skills with customers, also Cultural and psychological frameworks of wealth Negotiation skills and role plays.

5. Marketing For The Financial Industry

Develop an integrated service concept for high- net-worth individuals and determine how to implement suitable client segmentation. Understand the consequences of different service and pricing strategies and distribution channel policies. Demonstrate how to build sustainable customer loyalty for high-net-worth individuals, and how to define, implement and secure a service culture perceived as value- added by the client.

Furthermore, participants will learn about the possibilities provided by modern customer relationship management systems and data- mining techniques and how to apply to the setting of high-net-worth individuals, also several issues such as: Approaches to marketing, Customer behaviour and client segmentation.

Case Studies

Case-based discussions will be conducted with topics related to the subjects of training. Exam exercises and questions evaluation.



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