IAFM INTERNATIONAL ACADEMY OF FINANCIAL MANAGEMENT

Building the world's future leaders in finance

Chartered Wealth Manager

Certified by the International Academy of Financial Management (IAFM). Recognised in over 145 countries by 560 training providers, universities, colleges and business schools.

Who should attend?

- Private Bankers
- Wealth Managers
- Retail Branch Managers
- Corporate Account Managers
- Family Office professionals
- Brokerage and Market Analysts
- Investment Advisors and Financial Planners
- Investment Managers and Analysts
- Stock Market Professionals
- Portfolio and Asset Managers
- Financial Marketing Professionals
- Heads of Financial Accounts
- Financial Controllers
- Operation and Planning Managers.

Course Overview:

While complex selling and relationship management skills are a key element of the program, this designation course also presents a framework for portfolio management and financial planning for key clients, along with an overview of investment products in the Middle East region and beyond.

Key Competencies:

- Principles of Portfolio Management and asset allocation
- Establishing a unique value proposition – The Prospect
- Using technical knowledge to build the customer relationship – The Solution
- Enhancing and expanding the relationship – The Review

Pre-Requisite:

Graduates with less than three years experience are required to complete the Registered Financial Specialist program as a pre-requisite.

International Diploma in Wealth Management

Core Courses	Date	Duration
Chartered Portfolio Manager	27 Sep	5 Days
Chartered Wealth Manager	5 Jul	5 Days
Financial Analyst Designate - Chartered Market Analyst	1 Nov	5 Days

Elective Courses*	Date	Duration
Certified Private Equity Specialist	3 May	5 Days
Chartered Fund & Asset Manager	6 Dec	5 Days

* Select only one elective course

International Diploma in Financial Services

Core Courses	Date	Duration
Chartered Portfolio Manager	27 Sep	5 Days
Chartered Wealth Manager	5 Jul	5 Days
Financial Analyst Designate - Chartered Market Analyst	1 Nov	5 Days

Case Study Method:

The IAFM uses the Case Study Method to develop the Certified Cost Controller program and to help students absorb key skills and knowledge. When you are presented with a case, you place yourselves in the role of the decision maker as you read through the situation and identify the problem they are faced with. You perform the required analysis-examining the causes, and considering appropriate courses of actions to come to a set of recommendations.

IAFM™ Chartered Wealth Manager

Program Outline

Course Timings:

Registration will be at 08:30 AM on Day One with the program commencing promptly at 09:00 AM each day. There will be two short breaks each day and the sessions will conclude at 03:00 PM.

Day One

Introduction to Wealth Management

- Defining premier retail banking, wealth management and private banking – why they are different? Why customers are different and where they sit?
- The relationship component – why it's so important in HNWI banking today
- The global picture on WM growth and differentiation

Modern Portfolio Theory

- Advanced Portfolio Theory
- Risk and Diversification
- Managing Risk

The Future of Private Banking and Your Differentiation

- How Customer Behaviour is changing
- How banks will have to adapt, and differentiate
- Unique Selling Proposition - general

Getting to know your client

- Getting the meeting
- Understanding the needs of your prospect
- Building a unique value proposition - personal
- Establishing Rapport
- Building the foundations of trust

ROLE PLAY- The prospect

Day Two

DISC Profiling model

- What profile are you?
- Recognising your dominant personality type
- How does it help or hinder when dealing with clients?

Interpersonal Styles and the Psychology of HNWI clients

- The Psychology of Clients
- Primary Interpersonal Styles and Personality Types
- Decision Making, Communication and Social Drivers
- Task versus People-Directed Behaviour, Reserved and Outgoing styles
- Anticipating client behaviour based on personality types

Core Asset Classes, Asset Allocation and Financial Planning Principals

- Financial planning concepts and Principals
- Asset Classes, Model Portfolios and Yields
- Asset allocation and portfolio management

Wealth Management – Core Investment Products

- Protection versus Wealth Accumulation
- Core Investment products
- Mutual funds, unit trusts
- Bonds and Sukuk instruments
- Term life, Takaful, annuity and other life products
- Structured savings plans including funds, equities and bonds

Day Three

Solutions Stage

- Developing a solution for the customer
- Explaining and gaining buy-in
- Objection handling
- Tactical versus Strategic Selling Skills
- Needs-Based Selling versus Product or Risk based
  - Core Behavioural Segmentation Models for your market
  - Simple Investors
  - Sophisticated Investors

ROLE PLAY- The Solution

Advanced WM Products

- Introduction to other product structures including:
- Private Equity, IPOs, M&A
- Alternative Investments
- Derivatives
- Hedge Funds
- Commodities
- ForEx
- Islamic

Strategic Relationship Management

- Targeting the top customers
- Deepening relationships over time
- Strategic Selling Skills
- Customer Targeting and Gap Analysis

Day Four

Review Stage

- Managing expectations on performance
- Deepening the relationship
- Getting referrals

ROLE PLAY- The Review

Corporate Finance and the operation of Capital Markets

- Corporate Finance Principals
- Capital Markets Operations
- Debt versus Equity

Day Five

Wealth Planning

- Why plan?
- Establishing the need for planning
- Trust Structures

Group Presentation

Each group will present their solution/needs-based selling plan (with core benefits proposition) for the two segments they have chosen to specialize on.

Final Examination And Assessment

The examination will be a one and half hour paper, divided into both multiple choice and short-answer questions. A pass mark of 70% is required for certification.

Course assessment by participants

Registration Form

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Three Easy Ways To Enrol

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F +965 2246 2050
E enroll@aaimtraining,com

Course Dates

Chartered Wealth Manager
5 Jul — 9 Jul 2009

Timing

From 9:00 AM to 3:00 PM

Venue

AAIM Training Centre
Salhia Complex
Kuwait City

Program Fee

KD 950.00

Early Bird Discount

First ten registrations save KD50

Group Discount

Register three (3) or more delegates and receive **15%** OFF the Regular Fee

Payment Methods

Please pay by Cheque, Cash or Bank Transfer, prior to programme commencement.

All cheques should be crossed and made in favour of AAIIM International For Training & Development.

The fee includes instruction, course material and detailed case studies. On successful completion of the course, the IAFM award free membership for a period of up to 18 months.

Registration Details

Title: .... First Name: ....

Last Name: ....

Company Name: ....

Job Title: ....

Department: ....

Address: ....

....

Country: ....

Tel: ....

Fax: ....

Mobile: ....

Email: ....

For multiple registrations, please copy this page.

☐ Yes! I would like to receive information about future events and services via email.

In the case of unforeseen circumstances, IAFM reserves the right to change venue and/or speakers.

Payment Options

☐ Cash

☐ Cheque - Payable to "AAIIM International For Training & Development"

☐ Bank Transfer - AAIIM International Training For & Development, Commercial Bank of Kuwait, Hawalli Branch, Account Number: 6131466020

Cancellation

If you are unable to attend, a substitute delegate will be very welcome in your place. If this is not suitable, a KD 100 registration fees will be retained.

Customised Solutions And On-Site Training

IAFM provides tailor-made and cost effective in-house training as well as awarding professional recognition through international certification. Course certification may also be recognised for certain degree level qualifications or from part of a highly focused curriculum delivered by our team of international experts. Our globally recognised specialists are industry practitioners able to teach the 'how' and 'why' as well as 'what'. Call us now on +965 2246 2030 or email enroll@aaimtraining.com for further information or to make a reservation.