FP01 – Financial Planning:
Putting Theory into Practice

COURSE OVERVIEW

This course is designed to enable participants to understand diagnostic and profiling tools in designing and constructing a portfolio structure for private clients

PERFORMANCE OBJECTIVES

Upon completion of this course, participants will be able to:

- Use diagnostics and profiling tools
- Compute portfolio rebalancing
- Construct a portfolio structure with minimal risk
- Apply financial planning theories and guidelines in constructing portfolio structures
- Assess client's needs
- Communicate investment recommendations to clients ethically

COURSE PROGRAMME

8.30 am – 9.00 am	Registration
9.00 am – 9.10 am	Welcome remarks and introduction to the course
9.10 am – 9.40 am	**Session I:** Industry Overview, Investor Profiling Approaches & Philosophy of Wealth Accumulation, Protection, Management and Distribution
9.40 am – 10.00 am	Morning refreshments
10.00 am – 10.50 am	Case Study 1
10.50 am – 11.00 am	Break
11.00 am – 11.30 am	**Session II:** Behavioural Finance Theory & Investment Decision Making, Portfolio Planning Using Behavioural Finance Theory & Selection of Benchmarks and Benchmarking Practices
11.30 am – 12.20 pm	Case Study 2
12.20 pm – 12.50 pm	**Session III:** Portfolio Structuring and Asset Allocation Techniques for Private Clients, Impact of Market Cycles on Investors and Understanding Herd Behaviour & Portfolio Diversification and Risk Reduction
12.50 pm – 2.00 pm	Lunch
2.00 pm – 2.50 pm	Case Study 3
2.50 pm – 3.20 pm	**Session IV:** Modelling Investor Satisfaction and Utility Analysis, Customer Life Cycles and Diagnostics & Principles of Portfolio Rebalancing
3.20 pm – 3.40 pm	Afternoon refreshments

3.40 pm – 4.30 pm	Case Study 4
4.30 pm – 5.00 pm	Q & A
5.00 pm – 5.30 pm	Debrief & Program Wrap-up