FP02 – Financial Planning:
The Practice of Wealth Management

COURSE OVERVIEW

This course is designed to enable participants to be able to develop innovative structured products and total return solutions for private clients

PERFORMANCE OBJECTIVES

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

- Acquire knowledge and skills in developing a financial plan for client
- Acquire knowledge on portfolio management
- Develop suitable communication skills and competencies for client relationship management
- Acquire the art of influencing and marketing in an ethical manner

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:** Financial Engineering Through Structured Products and Derivatives
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:** Structured Products and Total Return Solution for the Sophisticated Investor & Strategies in Risk Reduction and Return Enhancement
11.30 am - 12.20 pm	Case Study 2
12.20 pm - 12.50 pm	**Session III:** Acquiring new clients & Developing Client Relationship Management Skills
12.50 pm - 2.00 pm	Lunch
2.00 pm – 2.50 pm	Case Study 3
2.50 pm – 3.20 pm	**Session IV:** Becoming a Trusted Advisor & Challenges and Opportunities
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