

# € TRAINING

International Investment and Wealth  
Management

A group of four smiling professionals, two men and two women, are seated around a table in a meeting. They are all wearing white shirts. The woman in the foreground is wearing a black top and a multi-strand necklace. The background is a bright, modern office setting.

16 - 20 September 2024  
Casablanca (Morocco)  
New Hotel



# International Investment and Wealth Management

REF: M2616 DATE: 16 - 20 September 2024 Venue: Casablanca (Morocco) - New Hotel Fee: 3685 Euro

## Introduction:

This training program is designed to provide participants with a comprehensive understanding of investment strategies and wealth management principles in a global context. It will equip participants with the skills and knowledge necessary to manage investments and financial portfolios, understand international financial markets, and make informed financial decisions.

## Program Objectives

At the end of this program, the participants will be able to:

- Analyze and evaluate global financial markets and investment opportunities.
- Develop and implement effective investment strategies.
- Manage diverse investment portfolios and wealth management plans.
- Understand and apply international financial regulations and compliance standards.
- Utilize financial tools and techniques to enhance investment performance and risk management.

## Targeted Audience:

- Financial advisors and consultants.
- Investment managers and analysts.
- Wealth management professionals.
- Financial planners and personal financial advisors.

## Program Outlines:

### Unit 1:

#### Introduction to International Investment:

- Overview of global financial markets.
- Understanding international investment instruments.
- Key players in international investment.

- Trends and opportunities in global investment.
- Basics of currency exchange and its impact on investments.

## Unit 2:

### Investment Strategies and Portfolio Management:

- Principles of portfolio construction.
- Asset allocation and diversification techniques.
- Active vs. passive investment strategies.
- Performance measurement and evaluation.
- Risk management and mitigation strategies.

## Unit 3:

### Wealth Management Principles:

- Fundamentals of wealth management.
- Client relationship management.
- Tax planning and optimization.
- Estate planning and wealth transfer.
- Ethical considerations in wealth management.

## Unit 4:

### International Financial Regulations and Compliance:

- Overview of international financial regulatory bodies.
- Key international financial regulations.
- Compliance standards and best practices.
- Anti-money laundering AML and know your customer KYC requirements.
- Impact of regulatory changes on investment strategies.

## Unit 5:



## Financial Tools and Techniques:

- Financial analysis and modeling.
- Use of technology in investment and wealth management.
- Software tools for portfolio management.
- Investment research and data analysis.