International Investment and Wealth Management

12 - 16 August 2024
London (UK)
Landmark Office Space

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REF: M2616 DATE: 12 - 16 August 2024 Venue: London (UK) - Landmark Office Space Fee: 5300 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.