Portfolio Risk Management in Retirement

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- Explain and integrate Modern Portfolio Theory within decision-making with clients
- Evaluate a variety of risks within asset classes using a multi-dimensional approach
- Revisit financial literacy relating to investment activities to measure risk and return

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Self-Study Application Form

For full curriculum details, see www.knowledgebureau.com

PORTFOLIO RISK MANAGEMENT IN RETIREMENT

Largely due to advances in preventing heart disease and more aware, and healthy, lifestyles, Canadians who reach age 65 are more likely than ever to live into their 90's. This takes retirement income planning into a much longer period in which a focus on continued accumulation and investing is as important as tax-efficient withdrawal of funds. Capital must be preserved at the same time. This course reviews the measurement and calculation of risk and return from this perspective.

CONTENT DESCRIPTION & KEY CONCEPTS

Imagine the power of capturing the underlying algebraic equations in the evaluation and management of risk and return in a pre-and post-retirement portfolio in a visual format so that clients and advisors can set short and long term goals, making better decisions about investing in this critical time when human capital is retired and financial capital must take over in providing income. The result would be a greater peace of mind and the opportunity to transfer an increasing family net worth to the next generation.

CERTIFIED SKILLSETS YOU WILL LEARN

An advisor will be exposed to software and online tools that will aid in the application of the concepts discussed throughout the course. Discussions and examples of how to employ these tools will be featured throughout the course graphically and in case settings.How to measure different types of returns. Students will learn to:

- Revisit financial literacy relating to investment activities to measure risk and return.
- Explain and integrate Modern Portfolio Theory within decision-making with clients, relating it to a post-financial crisis environment that still bears a number of short and long term risk factors.
- Use financial literacy to guard against complaints around inappropriate risk tolerance or investments.
- Evaluate a variety of risks within asset classes using a multi-dimensional approach.
- Use the combination of both risk and return to make more informed recommendations.

COURSE COMPONENTS

MULTI MEDIA INTRODUCTION – Your virtual instructor overviews key concepts in each chapter.

KNOWLEDGE JOURNAL TEXTBOOK – A full course manual containing detailed study materials, chapter by chapter.

EVERGREEN EXPLANATORY NOTES – A comprehensive reference library.

PRACTICE MANAGEMENT THESIS – Your formal case study online: a great review before your final exam.

TESTING – Chapters end with multiple-choice quizzes and true-to-life cases. A comprehensive final exam is written at the end of your studies.

ACCREDITATION – Earn 30 CE/CPD credits per course.

TABLE OF CONTENTS

Study Time: 30 hours

STEP 1: STUDENT IDENTIFICATION

Name ____________ Returning Student ID # ____________

Company ____________

Address ____________

City ____________ Province ____________

Postal Code ____________ Email ____________

Phone with Area Code ____________ Fax ____________

Referred By ____________ Current Designations/Licensing ____________

STEP 2: TUITION FEES

☐ **Single Course Tuition Fee**	**$795**
☐ **Electronic Textbooks**	**No Extra Charge**
☐ **Hard Copy Textbooks and Delivery**	**$ 95**

OR

☐ **Choose Certified Skills Diploma or Designation Program and save**

See www.knowledgebureau.com for tuition funding options and details on qualifying for tax credits.

STEP 3: PAYMENT PLANS

☐ **Full Payment Plan** (Branch Office study groups save 10%):

Number of Courses: _______ **A** x fee from Step 2 = **B** below

TOTAL TUITION FEES:	$____________B
Hard Copy and Delivery (see step 2)	$____________C
SUBTOTAL (B + C)	$____________D
GST/HST (885004713RT001)	$____________E
TOTAL DUE (D + E)	$____________F

☐ **EZ-Pay Instalment Plan:** Call 1-866-953-4769 for details.

STEP 4: PAYMENT METHODS

☐ **CREDIT CARD:** ☐ Visa ☐ MC ☐ Amex Expiry Date ___ / ___

Card Number ________________________________

Name on Card ________________________________

Signature ________________________________

STEP 5: REGISTRATION OPTIONS

Phone: 1-866-953-4769 **Fax:** 1-204-953-4762
Online: www.knowledgebureau.com
Email: registrar@knowledgebureau.com

☐ Unless box is checked, I provide consent for you to store my contact information and inform me of my progress and future educational opportunities.