Portfolio Construction for Real Wealth Managers

Only from

Knowledge Bureau®
Excellence in Financial Education

OF SPECIAL INTEREST TO:

- Financial advisory firms
- Independent financial advisors
- Financial planners
- Tax and accounting professionals

- Expand your career with knowledge in the intricacies of portfolio contruction
- Engage with your clients on the overall risk and return in their portfolios
- Design and implement portfolio strategies tailored to the client's risk profile

Study On Your Terms and Time in Our World-Class Virtual Campus

- Individualized study plans, instructor support
- 24/7 access to online lessons, quizzes
- Valuable e-journals, software, calculators
- Testing, accreditation and certification
- Easy pay plan customized to fit your budget
- Risk-free enrolment

How to Enrol in Your Self-Study Course Today

1. Enrol online at www.knowledgebureau.com
2. Scan and email the completed registration form to our Registrar at registrar@knowledgebureau.com
3. Call our Registrar toll-free at 1-866-953-4769
4. Fax your registration form to 1-204-953-4762

Free educational consultation available

Knowledge Bureau®
Excellence in Financial Education

Self-Study Application Form

For full curriculum details, see www.knowledgebureau.com

PORTFOLIO CONSTRUCTION FOR REAL WEALTH MANAGERS

Portfolio Construction begins with the thorough understanding of the risk profile of the client. Yet, by international standards, it is clear that the typical KYC or Asset Allocation Questionnaire is woefully inadequate. The Portfolio Construction Course begins with a thorough analysis of current risk profiling tools and their strengths and weaknesses for both the client and the advisor.

CONTENT DESCRIPTION & KEY CONCEPTS

This course explores how to evaluate the risk profile of different portfolios, how to evaluate the risk and return features of different types of investments and how the risk profile of these investment are impacted by changes in the business cycle and interest rates. All of these components assist in the ultimate process of designing and implementing the most appropriate portfolio to match the risk profile of the client.

CERTIFIED SKILLSETS YOU WILL LEARN

The student will learn to:

- Create their own unique risk profiling process for their client
- Link, in a quantitative manner, the client risk profile to the risk profile of the portfolio
- Evaluate the Risk and Return profiles of different types of securities
- Explain the impact of interest rates and rate projections on bond prices, stock prices and market performance
- Decompose interest rates into various components
- Demonstrate proven portfolio construction, optimization and follow up strategies
- Effectively communicate risk and return to your client
- Use risk analysis tools, risk models and portfolio construction skills to create optimal portfolios
- Presenting investment recommendations using supporting analysis

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** **$ 75**

OR

☐ **Choose Certified Skills Diploma or Designation Program and save up to 31% online at www.knowledgebureau.com**

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.