Portfolio Risk Manager

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 comprehensive risk management knowledge
- Engage with your clients as an advocate offering solid risk and return advice
- Ensure the portfolio changes over time as the client's risk profile changes

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 RISK MANAGER

The Portfolio Risk Manager works an advocate for the best interests of the client to ensure the risk profile of the portfolio is consistent with the changing risk profile of the client, now and in the future. Move your business from a commission-based, product-oriented model to that of an independent financial services professional with specific analytical tools to effectively evaluate and manage risk.

CONTENT DESCRIPTION & KEY CONCEPTS

This program teaches a proven approach to assisting the advisor in the development of a new practice model that creates a unique product (a new approach to portfolio design), combined with a unique service (portfolio risk management) at an effective price point for all of your clients (you set the fees), thereby enabling the advisor to be ready for the inevitable changes to come in the financial services industry.

CERTIFIED SKILLSETS YOU WILL LEARN

To incorporate the service model of a Distinguished Professional Practice, the advisor must implement the following goals:

- To develop a consistent method for evaluating the merits of new and different products
- To use the products selected to build a unique, tax effective, risk adjusted portfolio that is in alignment with your clients tolerance for risk
- To follow a value added Risk Management & Portfolio Monitoring Service to ensure the portfolio always remains consistent with your clients goals
- To do so at a price point that compensates you appropriately for your time while costing less to the client
- To develop a portfolio management process designed to produce consistent returns with minimal risk & fees

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

1 The Case for an Alternative Approach
2 Implementation Approaches
3 Portfolio Strategies to Manage Risk
4 Product Selection Strategies
5 Benchmarking
6 Portfolio Monitoring Strategies
7 How Your Practice Will Change
8 Compliance & Regulation
9 How to Transition to the Portfolio Monitoring Strategy
10 How to Manage Your New Business Model

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.