



**Financial Perspectives**  
Centre for Professional Excellence in  
Advisory Competency and Ethics

## Course Prospectus **Investment Masterclass**

## **Strategies and Techniques to Supercharge AUM Growth**

### **Program Overview**

Explore the dynamic Investment Masterclass, themed "Strategies and Techniques to Supercharge AUM Growth." This module is tailor-made for Financial Services Industry professionals seeking expertise in managing and enhancing customer portfolio value.

Engage with immersive case studies, collaborative learning, and focused lectures. Acquire competencies to navigate market uncertainties and deepen client engagement. From understanding macroeconomic dynamics to explaining vital macro drivers, participants will be equipped to address common investment challenges. By confidently applying portfolio planning and management processes, professionals can adeptly convey their value proposition to clients. This comprehensive program empowers individuals to elevate their portfolio management skills and excel in the complex financial landscape.



## Course Objectives

- a) UNDERSTAND the general macro situation of the world today in a VUCAD environment.
- b) Understand the critical macro drivers affecting fund performance and how to explain them to clients.
- c) Understand the fundamental reasons why clients fail to invest successfully.
- d) Understand the risk and return trade-off and how to articulate your value proposition to charge a trailer.
- e) Understand and be confident applying the portfolio planning and management process.



### Total Training Hours

Upon completion of this program, participants will be awarded the Certificate of Completion and 4 non-core CPD Training Hours



### Who Should Attend?

Financial Planning Professionals, Bank Relationship Managers and Insurance Specialists, Insurance Agents



### Course Fee

\$350 before GST



### Funding

This program is IBF-FTS recognised and is eligible for funding under the IBF-FTS scheme.

## Enquiry and Enrolment



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