

PREPARATORY TRAINING FOR INTERNATIONAL CERTIFICATE IN WEALTH AND INVESTMENT MANAGEMENT OF CISI, UK (VIRTUAL)	
Dates	August 23-24, August 30-31, September 6-7, September 13 (Mock Test I and Feedback), September 20 (Mock test II and feedback)
Duration	8 days (48 hours) – 8 am to 3 pm (including 2 breaks) (except September 13 and 20 -8 AM to 11 AM)
Location	Virtual-Participants' own location
Key Learning Objectives	To acquire an understanding the range of assets and investment products that are available in the market and find appropriate solutions to meet the investment, retirement and protection planning needs for clients.
Target Participants	Staff of wealth management, private banking, priority banking that deal with High Net Worth (HNI) clients
Pre-requisites	There are no pre-requisites for this course
Contents Highlights	<ul style="list-style-type: none"> • The Financial Services Industry • Industry Regulation • Asset Classes • Collective Investments • Fiduciary Relationships • Economic and Investment Analysis • Investment Management • Lifetime Financial Provision (15%)
Certification	CBFS certificate of completion for participants who attend all days of training
Training Methods	Lecture, Power Point presentation, pre-read materials, case studies, mock examination questions
Trainer Profile	Mr. Patrick Mahdi O'Neill An independent consultant based in Ireland. He has over 20 years' work experience in financial advising and training. He holds a Advanced Financial Planning Certificate of CII, UK and ICWIM, Introduction to Securities and Investment and Risk in Financial Services Certifications of CISI UK

Fee per participant	₹ RO 600/- payable in advance (Covers Training fee, soft copy of learning materials of the trainer, certificate of participation for participants who attend all days of training. It excludes registration and examination fees of CISI, which would be payable to CISI at the time of registration for the examinations, which is to be done directly with CISI).
Cancellation policy	No cancellation of nominations is possible after nominations are confirmed but substitution is permissible up to 48 hours before the start date of the training.
Technical Requirements for participation	<ul style="list-style-type: none"> • Participants should have a PC/Laptop with email access (preferably Outlook or Gmail) and with access to external links (since they will be sent a link to join the training through Zoom). It is preferable for participants to be working through WiFi as data consumption will be high. Mobile phones are discouraged due to poor visibility (especially of slide presentations) and external disturbances • The personal email addresses and mobile numbers (with whatsapp facility) of the participants will be required for enabling them to join the training.

For registrations and enquiries	<ul style="list-style-type: none"><li data-bbox="435 128 1323 170">• Ms. Khazina Al Bahri (khazina@cbfs.edu.om, 22059812, 99886654)<li data-bbox="435 170 1300 210">• Ms. Wafa Al Musalhi (wafaa@cbfs.edu.om, 22059813, 99886654)
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