# Executive Programs
## 行政人員課程系列

# Asset Management and Portfolio Analysis
# 資產管理和投資組合分析

## Objective

The workshop is designed to provide a thorough understanding of how the most quantitative techniques can be used in asset management. The program incorporates the fundamentals of portfolio theory and fixed income, investigates the international allocation of assets, offers the quantitative tools to manage passive and active funds and provides an overview of the principal hedge fund strategies.

**Level:** Advanced

## Contents

- Basic portfolio theory
- Global bond and fixed income portfolio
- Equity investment portfolio
- Fund management portfolio
- International portfolio allocation
- Alternative investment: hedge funds
- Exercises and case studies

## Who Should Attend

Financial planning practitioners, investment advisors, marketing executives and other interested parties

**IFPHK CE/SFC CPT/MPFA non-core CPD hours:** 6

## 課程目標

本課程的目的是如何把最定量技術在資產管理上。該計劃包含了基本的投資組合理論和固定的收入，分析國際資產分配，提供了定量工具，以管理被動和主動基金，及概述主要的對沖基金策略。

**程度**：高級

## 課程內容

- 基本投資組合理論
- 全球債券等固定收益證券投資組合
- 股票投資組合
- 基金管理組合
- 國際投資組合分配
- 另類投資：對沖基金
- 練習和案例研究

## 適合人士

財務分析員、財務策劃從業員、投資顧問、市場推廣行政人員及其他有興趣之人士

**香港財務策劃師學會持續進修學分/證監持續進修時數/強積金局(非核心)持續進修時數**： 6

# Effective Coaching Skills for Financial Planners
# 財務策劃師溝通技巧課程

## Objective

In today's world many of us talk about good communication and how we can achieve this consistently. This course aims to equip you to communicate effectively and confidently with your clients. Learning to increase your sensory range will give you access to high quality information about yourself and those around you. You will understand all the elements of rapport and how to use specific and general patterns of persuasion and influence.

**Level:** Advanced

## Contents

Module 1: Foundation of trusting relationship
Module 2: Sing the same song with your clients
Module 3: Moving closer to success
Module 4: Facilitating for success
Module 5: Coaching your clients to review their life goals and make decisions amongst alternatives in the financial aspects
Module 6: Different strokes for different folks - releasing the potentials of your team members with coaching skills
Module 7: Making a positive impact on team and organization considering the combination of different personality

## Who Should Attend

Financial planning practitioners, investment advisors, marketing executives and other interested parties

**IFPHK CE/SFC CPT/MPFA non-core CPD hours:** 21

## 課程目標

本課程的目的是為了加強客戶與你的溝通，讓你獲得更多的信息。透過良好的溝通令所有重要素的融洽，可以用增加影響力和説服力。

**程度：**高級

## 課程內容

第1單元： 基礎與誠信
第2單元： 對客戶有同理心
第3單元： 向成功靠攏
第4單元： 如何更容易地成功
第5單元： 訓練你的客戶，以檢討其人生目標，並在財務方面作出決定
第6單元： 技巧訓練，釋放隊員們的潛能
第7單元： 結合不同個性去獲得一個正面的影響

## 適合人士

財務分析員、財務策劃從業員、投資顧問、市場推廣行政人員及其他有興趣之人士。

**香港財務策劃師學會持續進修學分/證監持續進修時數/強積金局(非核心)持續進修時數：** 21