

Behavioural Finance & Wealth Management

1 day
Course

'Behavioural Biases in Wealth Management'

Course Objectives	Providing wealth managers with appropriate knowledge in behavioural Finance to educate their clients and increase client fund retention.
Who Should Attend?	Fund Managers, Wealth Managers, Financial Advisers, IFA's
Course Outline	<ul style="list-style-type: none"> ▪ Behavioural Biases and the Retail Investor <ul style="list-style-type: none"> ○ The common behavioural biases influencing retail investors ○ Portfolio effects of behavioural biases. ▪ Risks and Opportunities Behavioural Finance presents Wealth Management <ul style="list-style-type: none"> ○ How clients are likely to act when being influenced by behavioural biases in specific market conditions ○ Greed and Fear ▪ Educating the Client <ul style="list-style-type: none"> ○ Ensuring the client understands the risks behavioural biases pose in their portfolio performance.
Learning Outcomes	<ul style="list-style-type: none"> ▪ The ability to recognise behavioural biases influencing client decision making ▪ Sufficient knowledge to education clients on the risk of behavioural biases ▪ The ability to increase retention of client funds.