

2022 TRAINING



DEC 14-15

9:00am to 3:00pm

A to Z of Investment Advisory (On-line)

Acquire the necessary edge in these two days scheduled to raise the practice bar for professionals in this segment of the industry. Still considered the strongest link in the value chain of the money management services industry, the subject will be covering amongst other often hotly debated topics, the models, the contracts, the fiduciary versus suitability standards, remunerations and market relevance. Investment advisory holds the key to so many exciting business opportunities both for corporates and individuals as service vendors when/where duly registered. Delegates will learn the whole spectrum of the fiduciary service, best practice, other professional requirements of investment experts, and the importance of the commitment to practice standards in this specialized field.

Day 1

1. Introduction: What makes up the investment advisory/buy-side function;
2. Global trends in the advisory business;
3. Analysis: Investor Psychology and Utilities;
4. Financial plan coordinator and executor;
5. Adviser business models – pros and cons.

Day 2

1. Adviser fees and other remuneration/compensations;
2. Advisory and technology;
3. Advisory contracts and operations;
4. Advisory Management Index.

Please NOTE: Link to Zoon Training Room will be sent to registered delegates 24 hours before start time.

This Course is also available on demand and in-person subject to further terms and conditions.

Training is open to all interested stakeholders in the industry: Asset Owners, Investment Advisers & Managers, Analysts and Regulators, etc.

Course Fee: NGN75,000.00 (inclusive of Taxes)