

DECEMBER 13-14

9:00am to 3:00pm

Marketing of Financial Assets (On-line)

A pragmatic 2-day session focused on selling investment products especially in the digital age, this training takes a holistic view of the sales function in a professional money management firm with a view to equipping participants with the best practice approaches to efficient revenue generation for the firm. It takes both a macro and micro-analysis approach to teaching the fundamentals of financial markets and the main drivers of product sales across traditional as well as alternative asset classes in the age of unrelenting technological advancements. Delegates are bound for another exciting experience the KingsThrones' type!

Day 1; Understanding Financial Assets/Products:

1. Introduction: Financial markets and instruments;
2. Traditional Asset Classes/Instruments and Their Roles;
3. Alternative Asset Classes/Instruments and Their Roles;
4. Investment Management and Product Creation – The Internal Dynamics;
5. Manager Philosophy, People and Processes – The Investment Strategy;
6. Investment Performance Evaluation – From Measurement to Due Diligence and Selection.

Day 2: Financial Products Marketing In Action:

1. Product dynamics (Features, Sales Channels & Gross Margins);
2. The Corporate Communications Function;
3. Understanding The Exponential Gap in Financial Products Delivery – The FinTech Surge/Scourge;
4. Product Marketing and Global Best Practices – The GIPS® Advertising Guidelines;
5. Local Marketing Rules and Regulations;
6. Firm Marketing Strategy – Case Studies.

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: NGN145,000.00 (Inclusive of Taxes)

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