Certified Financial Consultant Course

Objectives

A strong knowledge in financial statement analysis is a prerequisite for managers who want to be conversant in financial concepts, identify business opportunities and evaluate the account impacts of investment options.

In this intensive 32 - hour course, participants will learn the risk management frameworks and how to analyze credit strengths of companies using financial statements. All materials are designed for audience with a background in financial industry and will be presented through practical examples.

Speaker

The speakers have extensive finance experience acquired from roles he has held at major banks and investment securities firms in Hong Kong.

One of the speaker who has been working as Institutional Sales and Wealth Management for over 10 years in financial institutions. Apart from the financial institutions experience, he also teaches the undergraduate course in HKU Space and Open University of HK.

Another speaker was graduated from the Cornell University, He worked in a fund management company on alternative asset class before he joined HSBC Broking Services (Asia) Limited. He holds a Chartered Financial Analyst (CFA) designation.

Program Outlines

Module 1 : Financial Statements Interpretation & Analysis
- Financial Reporting Requirements
- Fundamentals of Financial Statements
- Ratio Analysis and Interpretation
- Earnings Forecast

Module 2 : Practical Corporate Finance
- Introduction to Corporate Finance
- Key theories and their Application
- Time value of Money
- Valuation Techniques

Module 3 : Personal Financial Planning & Consulting
- Introduction to Personal Financial Planning
- Application of Insurance & related Instruments
- Insurance for Life and Health
- Process and Techniques in Personal Financial Consulting
- Retirement Planning / Estate Planning
- Professionalism and Ethics in Financial Planning and Consulting

Module 4 : Investment & Risk Management

Fundamentals of Investments
- Analysis and Valuation of Equity Investments
- Portfolio Theory & Asset Allocs ation
- Risk Management
- Markets Regulations & Frameworks

Target Participants

People who work in the financial industry; for instance, banking, insurance, investment, securities, and wealth management, and people who are engaged in business consultancy

Program Details

Language : Cantonese (Supplemented with English materials)
Date &Time: 13th,20th, 27th Apr & 4th , 11th & 18th May
Venue : 11/F, 69 Jervois Street, Sheung Wan, Hong Kong
Fees : Total HKD 25,000
(4 Modules, CFC certification & examination fee)
Enrollment : By Fax at 3590 9660 or In person at our training centre
Enquiry : 2581 3880 / 3590 9885
E-mail : info@aicfc.org

Registration Form

Certified Financial Consultants 'CFC' Course

(as on I.D. Card) **Full Name : Mr / Ms / Mrs** (in English)	**Full Name:** (in Chinese)
Membership no:	**Organization:**
Department:	**Position:**
E-mail:	**Mobile / Telephone no:**

* Course confirmation notice will be sent to you via this e-mail address one week before course commences

Payment Method: ☐ Crossed cheque payable to **"Sino Fame Education Centre Ltd"** (Cheque no:_______Bank_______)
☐ Deposit to **HANG SENG A/C# 787-107903-001**
☐ Cash Amount: HK$ _______________

How did you know about this program?

☐ Website ☐ AICFC Staff ☐ E-news ☐ Media
☐ Friends / Colleagues ☐ Others (Please specify): ______________________________

Terms and Conditions
1. All fees paid are non-refundable.
2. Participants who have settled payment will receive course confirmation by e-mail 7 days prior to the course date.
3. All payments must be settled before course commencement.
4. In case of over-subscription, priority will be given on 'first-serve' basis.
5. We reserve the right to cancel, modify and/or postpone the course.
6. All courses will be held as scheduled if Typhoon Signal No. 8 or above/Black Rainstorm Warning is lowered 3 hours before the course's start time.

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