

Investment Principles & Risk

Structured Learning CPD for qualifications top-up under RDR particularly PCIAM

9 December 2010

**Cosmopolitan Hotel
2 Lower Briggate, Leeds LS1 4AE**

COURSE HIGHLIGHTS

Take part in this practical half-day course and learn all about asset classes, investment theories and the impact of risk. Benefit from having all the main principles explained to you by an expert, plus the opportunity to apply them, ask questions and discuss the area in depth.

This event qualifies as structured learning to fill the investment principles and risk gaps between the PCIAM and the new exam standards.

All existing FSA-authorized advisers who hold, or choose to obtain, one of the existing qualifications on the FSA's list of transitional qualifications will be able to fill gaps between their qualification and the new exam standards through CPD. This CPD top-up must be completed by 31 December 2012 and should be structured learning.

The course is open to all, not just those who need to gap fill under RDR.

Visit cisi.org/ipr for the full course programme.

COURSE TOPICS

- Understand the characteristics, inherent risks, behaviour and correlation of asset classes
- Understand the merits and limitations of the main investment theories
- Understand the nature and impact of the main types of risk on investment performance

COURSE DIRECTOR

Ian Richardson has a long and wide ranging experience, having spent many years with Barclays, where he became Head of Chief Administration Office, Barclays Stockbrokers and was responsible for the human resources, training, marketing, corporate administration and premises functions, as well as the ShareSave business.

Since 2002 he has been engaged in a variety of training and consultancy assignments for major clients including Credit Suisse, HBOS, Lloyds TSB, Brewin Dolphin and Rensburg Sheppards. These assignments have involved supporting change and designing and delivering training programmes to embed change by addressing the knowledge and skills base.

More recently, Ian has been responsible for the design and delivery of RDR training and co-authored the CISI's official learning and reference manual for PCIAM.

