Wealth Management
Module overview

Available through classroom training, the modules below can be configured to suit specific audience requirements:

- core investment analysis
- investment risk and return
- alternative investments and sophisticated investors
- financial planning
- trusts
- succession planning and philanthropy
- comprehensive financial planning and the regulatory environment
- successfully managing a team of CRMs
- competencies and "mindset" of a highly successful wealth manager
- building your personal brand
- building a profitable client portfolio – retention/ growth and increasing wallet share
- portfolio action planning

For further information, please contact the team at **international@libf.ac.uk**