AB MAXIMUS

Capital Markets Training

A.B. Maximus & Co. Pte Ltd
160 Robinson Road
#27-06 SBF Centre
Singapore 068914

T: 6327 5436
F: 6214 3596
E: Trainingadmin@abmaximus.com

How to Grow Your Remisier Business with a Financial Planning Approach

3 CPD HOURS

Programme Code: P181217VXE

Course Overview and Outline

Investments do not exist on its own. Clients buy investments and securities to achieve a financial objective. It may be a retirement goal, a lifestyle goal, or children education funding goal. Understanding how the client thinks from a financial planning approach will help you build lasting business relationships and grow the overall investment amount the client places with you.

This workshop aims to equip existing remisiers the skills & tools to actively engage their clients, align with their financial goals, and upsell their services.

Key Learning Outcome

- To understand the financial planning process.
- To understand the role of securities in a client's Investment & Accumulation Plan.
- To identify clients' financial goals & objectives.
- To quantify and translate client's goals into return objectives.
- To identify clients' risk tolerance and investment style.
- To analyse and recommend the appropriate classes of securities that meet the client's return and risk objectives.

IBF-FTS Funding

This programme is recognised under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met. For more information please visit IBF Website.

Please note that in no way does this represent an endorsement of the quality of the training provider and programme. Participants are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS claims may only be made for recognised programmes with specified validity period.

AB Maximus
Capital Markets Training

How to Grow Your Remisier Business with a Financial Planning Approach

Course Methodology

- Class-based presentation
- Interactive Q&A session

Who Should Attend

- Individuals from the finance industry
- Trading Representatives
- Remisiers

Speaker's Profile

Chua I-Min, CFA conducts regular classes for SGX Academy on fundamental analysis, stock valuation, REITs and property stocks investments. His flagship program titled "Create a Secondary Income Stream through Long Term Share Investing" has been well received by retail investors. A book with the same title has been written to reach out to a wider audience.

Professionally, I-Min has more than 11 years of working experience mainly in the investment industry. He was the Chief Operating Officer for A.B. Maximus before his current role. Previously as a real estate investment professional in CapitaLand and subsequently PhillipCapital, he had collectively done investment deals amounting to S$250 million. Prior to that, he was based in China, participating in a successful IPO exercise of a Chinese company listed on the Singapore Exchange.

Register your interest today!

For in-house training request, please contact Alson at alson@abmaximus.com.
Competitive corporate discounts available for bulk registration.

Visit https://www.abmaximus.com/supplementary-cpd-courses **to find out more about the other courses available.**

A.B. Maximus & Co. Pte Ltd 160 Robinson Road, #27-06 SBF Centre, Singapore 068914
T: 6327 5436 F: 6214 3596 | E: Trainingadmin@abmaximus.com