# The Individual Investor - Online

This introduction to portfolio management theory lays out the different types of investor characteristics and their implications for portfolio construction.
This course replicates the content from lesson 2 of Portfolio Management I - Online
This is an asynchronous eLearning course that can be accessed 24/7 from any internet enabled computer. Subscription period for this course is 90 days.

## Available Session(s):

| | | |
|---|---|---|
| **Available Today** | Online | USD $60 |

Online
Instructor(s):[]

## Targeted Audience

Junior portfolio managers, money managers, research analysts, client services staff, consultants, individual and institutional investors, private bankers and financial advisors, research staff members of pension boards and plan sponsors.

## Advance Preparation

No advance preparation required.

## Learning Objectives

Students will be able to:
· Apply the Five-Way Model to analyze and understand prospective clients and their needs
· Help individuals determine how much risk they can assume by examining portfolio goals
· Compare traits of individual and institutional investors

**Level:** Basic

**CPE Credits:** 1

**Instructional Method:** Self-Study

# Detailed Outline

**The Individual Investor**
· Five way model
· Risk and the individual investor: an examination of portfolio goals
· Individual vs. institutional investors

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