Portfolio Management and Duration - Online

This course covers diversification, tax issues, duration, risk tolerance, market timing, estate planning and dollar cost averaging - investment vehicles and concepts that lie at the heart of developing an investor profile and implementing successful wealth management strategies.
This course replicates the content from Lesson 2 of Wealth Management - 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 Instructor(s):[]	Online	USD $60.00

Targeted Audience

New private bankers, new wealth advisors, brokers who are going to cover broader wealth solutions, portfolio managers and other Product Specialists requiring an in-depth overview of wealth management, and individuals working in the finance arena

Advance Preparation

No advance preparation required.

Learning Objectives

Students will be able to:
· Define duration to determine the validity of an investment strategy
· Understand the factors that immunize a portfolio
· Understand how to mix duration to meet clients' investment objectives
· Assess the risks associated with duration
· Differentiate between systematic and unsystematic risk

Level: Basic

CPE Credits: 1

Instructional Method: Self-Study

Detailed Outline

Portfolio Management and Duration

· Defining duration
· Immunizing a portfolio
· Duration of stocks
· Mixing duration
· Duration and risk

For more information regarding administrative policies such as complaints and refunds, please contact our offices at 212-641-6616.