Asset Allocation and Taxation - Online

This module discusses choosing the mix of assets that works for your client.

This course replicates the content from Lesson 4 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.

Targeted Audience

New private bankers, new wealth advisors, brokers who are going to cover broader wealth solutions, new portfolio managers and private investors.

Advance Preparation

No advance preparation required.

Learning Objectives

Students will be able to:

. Allocate a client's assets among the appropriate assets

. Implement asset allocation decisions for a portfolio

. Assist clients to minimize estate and income taxes

Follow-Up Courses

Investor Profiling - Online

Introduction to Portfolio Risk - Online

Estate Planning - Online

Managing Portfolios with Bonds - Online

Managing Portfolios with Equities - Online

Level: Basic

CPE Credits: 1

Instructional Method: Self-Study

Detailed Outline

Asset Allocation and Taxation

. Choosing an asset mix

. Mutual funds vs. direct investment

. Market timing vs. dollar averaging

. Which investments, which account

. Planning for the next generation

Duration: 1 hour

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