



## Asset Allocation and Taxation - 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 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.

### Available Session(s):

Available Today

Online

USD \$60.00

Instructor(s):[]

### 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:

- Allocate a client's assets among the appropriate assets
- Implement asset allocation decisions for a portfolio
- Assist clients to minimize estate and income taxes

**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

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