Organised By

IIR MIDDLE EAST
CONFERENCES ■ EXHIBITIONS ■ TRAINING

On Satisfactory Completion Of This Programme You Will Be Entitled To Use The Designation Chartered Wealth Manager (CWM™) On Your Resume And Business Cards!

Chartered Wealth Manager™

11 – 15 May 2008

Dusit Thani Hotel, Dubai, UAE

Key Benefits Of Attending This Important Course:

- Be able to explain the key regulatory drivers in your market and their impact on the wealth manager
- Explore the importance of relationships in wealth management
- Understand the various portfolio selection techniques and the importance of balance in a portfolio
- Enhance your understanding of wealth management products and the most effective way to market them
- Share in the knowledge of world leading training consultants from the AAFM
- Develop your technical communication skills through supervised Deep Dive Brainstorming sessions

If you complete this course and two additional financial services courses in the next two years you will receive the International Diploma in Financial Services from the Royal Society Of Fellows and AAFM!

AMERICAN ACADEMY OF FINANCIAL MANAGEMENT

www.iirme.com/cwm

Official Regional Recruitment Partner

Official IT Partner

Official Media Monitoring Partner

Dear Wealth Manager,

Increasing liquidity and customer knowledge of the financial services industry has led to a rise in demand for qualified and certified wealth management professionals. High Net Worth clients demand a level of support and industry expertise that can no longer be met by the general banking community.

To help meet this need IIR, The Royal Society Of Fellows (RSOF) and the American Academy of Financial Management (AAFM) have developed the **Chartered Wealth Manager™** programme. This important executive education programme has been extensively remodeled for 2008 and is designed to equip you with the skill and expertise to take your wealth management activities to the next level of professionalism and carries an official certification recognised by over 500 business schools and leading universities. On satisfactory completion of this programme you will be entitled to use the post-nominal designation CWM™ on your business cards and resume.

In addition, if you are seeking a further qualification as a financial services professional you may chose to take two additional financial services training courses over the next two years and receive an **International Diploma In Financial Services.** Please see inside for more details on this special opportunity.

This Chartered Wealth Manager programme is delivered by expert trainers selected from the American Academy of Financial Management's most experienced teaching staff. Each of them has many years experience in financial services and as professional development trainers and coaches. They will ensure that you receive the maximum possible benefits from this course through a mixture of one on one coaching, group delivery, supervised break-out sessions and practical case studies.

Secure your future as a **Chartered Wealth Manager™** now – see the back page for five easy ways to register and the amazing offers available for early bird booking. You could save hundreds of dollars!

Your expert speaker faculty and I look forward to welcoming you to this important programme in May 2008.

Yours Sincerely,

Jeremy Butcher
Senior Conference Manager

P.S. Don't miss the chance to become a professionally certified Wealth Manager – Act now and book your place!

Meet Your Expert Programme Leaders

Sameh Temraz

An experienced investment professional who has worked in the financial planning, wealth management and private banking sectors in London, Canada and the Middle East for over 18 years. Sameh has experience managing wealth management teams for Union National Bank, Zurich International, Citibank, Bank of Montreal and London Insurance/Prudential Securities.

Sameh's expertise and experience include managing portfolios of individuals worth more than US$120M and leading teams of 20+ professionals dedicated to investment and wealth management. A dynamic and energetic speaker, Sameh speaks fluent Arabic and English and some French. His skills extend well beyond the typical wealth management arena with his keen ability in portfolio management, property investment and asset management, development of new sales and marketing techniques and service improvement. He is now managing client's funds of total assets around AED 5 billion in the GCC region. Personally responsible throughout his career for between 30-200 Ultra High-Net Worth clients.

Michael Preiss is Board Advisor to the American Academy of Financial Management.

He is Associate Director with the Investment Advisory Group of HSBC Private Bank based in Dubai. In addition he is a Director and Research Fellow at The Asian Bond Market Forum, a Hong Kong based non-profit think-tank. The ABMF provides policy research on the development of Asian local currency bond markets and advises on bond-market issuance programmes and infrastructure development. Michael is also a Director and Economic Advisor to East India Asset Management in Sri Lanka, contributing to the launch of the Ceylon Index Fund, the first Index fund on the Colombo Stock Exchange.

Michael is a graduate of the European Business School with a major in Finance and International Economics, having studied at the schools centers in London, Paris and Bologna, Italy in the respective local languages. In addition he has studied in Japan, Korea and China. He is working with Thailand's Ministry of Finance, as one of the founding members of the Asian Bond Market Development Secretariat in Bangkok.

Michael is a regular guest commentator on Bloomberg TV, CNBC Asia and the BBC as well as India's New Delhi Television. He is a columnist for financial magazines in Hong Kong and China, as well Singapore's Business Times and the Bangkok Post where he contributes the regular "Ahead of the Curve" column. He is also Adjunct Associate Professor, teaching finance at SMU (Singapore Management University).

Course Timings: *Registration will start at 08:00 on the first day. The course will commence at 08:30 and conclude at 14:30 with lunch. Refreshments will be served at appropriate times throughout the day.*

Course Outline

Day One – Sunday, 11 May 2008

Introduction To Wealth Management
- Defining premier retail banking, wealth management and private banking – why they are different
- The relationship component – why it's so important
- The psychology of High Net Worth (HNW) investors – what's important, what's not

Corporate Finance And The Operation Of Capital Markets
- Corporate finance principals
- Capital markets operations
- Debt versus equity
- Islamic finance

Day Two – Monday, 12 May 2008

Advanced Relationship Selling Techniques
- Advanced sales and marketing concepts
- Tactical sales skills
- Lead generation
- New client acquisition
- Handling client meetings
- Needs-based selling versus product or risk based
- Strategic relationship management
- Targeting the top customers
- Deepening relationships over time
- Strategic selling skills
- Customer targeting and gap analysis

Financial Marketing And Advanced Communication Tools
- Marketing banking products
- Changing consumer behavior
- Developing new products and services for banks
- Promotion and communication
- Use of web, email, and new communication channels with your customers

Day Three – Tuesday, 13 May 2008

Asset Classes And Financial Planning Principals
- Financial planning concepts and principals
- Asset classes, model portfolios and yields
- Asset allocation and portfolio management

Wealth Management – Core Investment Products
- Protection versus wealth accumulation
- Core investment products
- Mutual funds, unit trusts
- Bonds and Sukuk instruments
- Term life, Takaful, annuity and other life products
- Structured savings plans including funds, equities and bonds

Day Four – Wednesday, 14 May 2008

Advanced Wealth Management Products
- Detailed product structures including: private equity, IPOs, M&A
- Alternative investments
- Derivatives
- Hedge funds
- Commodities
- ForEx
- Islamic
- Trusts and family office

Day Five – Thursday, 15 May 2008

Modern Portfolio Theory
- Advanced portfolio theory
- Risk and diversification
- Managing risk

Sophisticated Portfolio Management
- Structured products
- Managing and constructing large-scale portfolios
- Managing inherited wealth

Breakout Session Preparation (1 hour):
Each group will present their solution/needs-based selling plan to the two segments they have chosen to specialise in.

Final Examination And Assessment.
The examination will be a one hour multiple-choice questionnaire and a passing grade is a requirement for the award of the CWM™ designation.

Who Should Attend?

This course has been extensively revised from previous years and is suitable for all those with a finance background who wish to move into wealth management or existing wealth management practitioners who want to cement their knowledge and achieve a professionally recognised certification.

International Diploma In Financial Services

In conjunction with AAFM and the Royal Society Of Fellows, IIR Middle East is proud to offer a linked series of wealth management and finance courses leading to the award of the internationally recognised **International Diploma In Financial Services.**

Each course in the series is a 'stand alone' module providing its own benefits and there is no requirement to attend the courses in any particular order. To be eligible for the Diploma, you must complete all three courses and the associated assignments within two years. This allows you the flexibility to attend the courses at your own pace taking into consideration your work commitments. Your qualification may be gained within one year or over a two-year period.

In order to successfully complete the Diploma, you will be required to demonstrate a good level of management including the completion of an assignment and/or examination at the end of each course. Guided by your instructor, you will have the opportunity to progress according to your particular needs.

The three courses you need to complete to obtain the International Diploma are:

- **Chartered Wealth Manager™**
  11 – 15 May 2008
- **Certificate In Financial Analysis™**
  13 – 17 July 2008
- **Certified Portfolio Manager™**
  26 – 30 October 2008

What Will You Learn From This Series Of Courses?

The programme concentrates on the practical application of financial and capital markets theory, investment and portfolio management and principles at the operational level within a financial services organisation, thus providing momentum for continuing professional and personal development.

By completing the series you will:

- Enhance your understanding of capital markets globally and regionally
- Assess the value of listed companies and reported performance through financial statement analysis
- Understand the balance of risk / return and time horizon in portfolio management
- Understand client needs, asset allocation and client retention strategies
- Market your finance products and services more effectively
- Identify market opportunities in the GCC region and worldwide

Course Pre-Requisites

While there are no formal prerequisites for these courses, the terminology used and learning assumes a working knowledge of finance at the graduate level as a minimum. Individuals working within the financial services sector will be familiar with the base terms and theories used in coursework. Those without financial services experience will be required to do both pre-reading and additional study during the course to ensure a successful passing grade.

Progression And Exemptions

The American Academy of Financial Management and the Royal Society Of Fellows have formally agreed Progression and Exemption opportunities for candidates who have successfully completed the **International Diploma in Financial Services** qualification with a number of leading universities.

James Cook University (Australia)
Entry to MBA programme, 3 unit exemption

Swiss Banking School
Entry to MBA (Wealth Management) some exemptions

Dubai Womens College (UAE)
Various exemption opportunities

RMIT University (Australia)
Entry to MBA in Finance with 60 credits remission

AACSB, ACBSP Universities
Entry to other programmes through the United States, Europe and elsewhere

AMERICAN ACADEMY OF FINANCIAL MANAGEMENT

About the American Academy of Financial Management™

The American Academy of Financial Management™ is the world's fastest growing professional association with approximately 40,000 members in over 145 countries hosting and organising certification training worldwide and offering exclusive board certification designations to candidates who meet the highest professional standards and assessment criteria.

The AAFM was chosen in 2006 by Dubai Financial Market (DFM) to conduct the seven week professional training component of the Kafa'at programme for graduates entering the brokerage and trading industry. AAFM also has alliances with the Kuwait Institute of Banking Studies, the Swiss Finance Institute, Dubai Institute of Human Resource Development, Dubai Quality Group, Knowledge Village and many more.

With liaison offices in Dubai, Hong Kong, Kuwait, Singapore, San Francisco, Monterey, New Orleans, Melbourne, Beijing, the Caribbean, India and Europe, AAFM is fast becoming the world's leading professional association for financial practitioners. The AAFM Executive Designation Programmes also provide the assurance that the holder has met the suggested criteria for graduate credentials set out in the Ibanez US Supreme Court Decision and are recognised on both the NASD and US Department of Labor websites.

Chartered Wealth Manager™

11 – 15 May 2008 • Dusit Thani Hotel, Dubai, UAE

IIR Middle East certified by

UKAS QUALITY MANAGEMENT | MOODY INTERNATIONAL CERTIFICATION ISO 9000 Approved

ISO 9001:2000

FIVE EASY WAYS TO REGISTER

971-4-3352437 971-4-3352438 register@iirme.com

IIR Holdings Ltd.
PO Box 21743, Dubai, UAE

GCS/IIR Holdings Ltd.
P O Box 13977, Muharraq, Kingdom of Bahrain

www.iirme.com/cwm

For further information and **Group Discounts**
contact 971-4-3352483 or email: info@iirme.com

Run this event in-house and save up to 40%.
Call today on 971-4-3352439

WEB BC2598

Yes, I want to register for:

Event	Dates	Price before 2 March 2008	Price between 2 and 22 March 2008	Price after 22 March 2008
☐ **Chartered Wealth Manager™**	11 – 15 May 2008	US$ 4,250 **(Save US$ 500)**	US$ 4,550 **(Save US$ 200)**	US$ 4,750

Other courses in the Diploma In Financial Services:

☐ **Certificate In Financial Analysis™**	13 – 17 July 2008	US$ 4,750
☐ **Certified Portfolio Manager™**	26 – 30 October 2008	US$ 4,750

Discounts

Register For All Three Courses And	SAVE US$ 1,500	US$ 12,750
Register For Any Two Courses And	SAVE US$ 1,000	US$ 8,500

Course fees include documentation, luncheon and refreshments. Delegates who attend all sessions will receive a Certificate of Attendance.

PERSONAL DETAILS:

	Title	First Name	Surname	Job Title	Department	Email
1st Delegate						
2nd Delegate						
3rd Delegate						
4th Delegate						

To assist us with future correspondence, please supply the following details:

Head of Department						
Training Manager						
Booking Contact						

Company: ....

Address (if different from label above): ....

.... Postcode: .... Country: ....

Tel: .... Fax: ....

No. of employees on your site:

☐ 0-49 ☐ 50-249 ☐ 250-499 ☐ 500-999 ☐ 1000+

Nature of your company's business: ....

☐ Yes! I would like to receive information about future events & services via email.
My email address is: ....

Payments

A confirmation letter and invoice will be sent upon receipt of your registration. Please note that full payment must be received prior to the event. Only those delegates whose fees have been paid in full will be admitted to the event. You can pay by company cheques or bankers draft in Dirhams or US$. Please note that all US$ cheques and drafts should be drawn on a New York bank and an extra amount of US$ 6 per payment should be added to cover bank clearing charges. All payments should be made in favour of IIR Holdings Ltd.

Card Payment

☐ Please charge my credit card: ☐ Visa ☐ Mastercard ☐ American Express

Name on Card: ....

Card Number: .... Exp. Date: ....

Signature: ....

Cancellation

If you are unable to attend, a substitute delegate will be welcome in your place. If this is not suitable, a US$ 200 service charge will be payable. Registrations cancelled less than seven days before the event must be paid in full.

Avoid Visa Delays – Book Now

Delegates requiring visas should contact the hotel they wish to stay at directly, as soon as possible. Visas for non-GCC nationals may take several weeks to process.

Due to unforeseen circumstances, the programme may change and IIR reserves the right to alter the venue and/or speakers.

Event Venue

Dusit Thani Hotel, Dubai, UAE
Tel: 971-4-3433333

Accommodation Details

We highly recommend you secure your room reservation at the earliest to avoid last minute inconvenience. You can contact the IIR Hospitality Desk for assistance on:
Tel: 971-4-4072693
Fax: 971-4-4072517
Email: hospitality@iirme.com

MF **PG F150** FINANCE