Investment Planning

Purpose: Investment Planning builds upon Fundamentals of Investment and explores in greater detail the theoretical and practical concepts behind investing, including financial statements, portfolio theory and international investments.

Course content:

» Applying an understanding of risk to portfolio construction
» Portfolio theory and efficient market theory
» Investment styles and strategies
» Research data and their application
» Analysing company performance and ratios
» Investment products including international investments
» Constructing portfolios and comprehensive investment plans

Learning outcomes:

On successful completion of this course, learners will be able to:

» establish relationships with clients and determine extent of service
» ascertain a client's investment risk profile and construct an investment portfolio
» research and analyse investment products and comment on their performance
» explain the various investment styles and strategies commonly used
» develop appropriate investment strategies and solutions
» evaluate investment options on behalf of a client
» develop a comprehensive investment plan
» successfully negotiate the elements, terms and conditions of an investment plan/portfolio with a client
» analyse a company's performance and ratios

Delivery methods:

This course is designed to be delivered through a combination of individual study and in a classroom/workshop format led by an experienced facilitator. This course is also available and fully supported through the Adviserlink distance learning programme.

This course is approved by the New Zealand Qualifications Authority under the provisions of the Education Act 1989, and Adviserlink Learning Ltd is accredited to teach it.

Assessment:

Assessment for Classroom option:

Assessment	% of Overall Assessment
Pre-course assignment – readings and short answer questions	10%
Post-course assignment – case study: Portfolio research/analysis assignment	40%
2-hour closed book examination	50%

Assessment for Distance learning option:

Assessment	% of Overall Assessment
Assignment 1 – short answer and scenario based questions	5%
Assignment 2 – short answer and scenario based questions	5%
Assignment 3 – case study: Portfolio research/analysis assignment	40%
2-hour closed book examination	50%

Pre requisite/s:

Open entry, however, learners must have successfully achieved competence in the learning outcomes and competency elements contained in or equivalent to the Fundamentals of Investment component.

Dates of course/s:

Registrations for distance learners are accepted at any time throughout the year. Please refer to the course calendar on our website www.adviserlink.co.nz for the date/s and location of our classroom options.

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