Hubbis Digital Training Syllabus for CPD/CPT

THE HUBBIS PLATFORM (AND CONTENT) IS USED BY MANY TYPES OF WEALTH MANAGEMENT FIRMS TO HELP THEM MEET THEIR COMPLIANCE, CPD, REPORTING AND GENERAL LEARNING AND DEVELOPMENT REQUIREMENTS - IN A TRANSPARENT, ROBUST AND PROFESSIONAL MANNER.

Industry

The Industry

Introduction to the Wealth Management Industry
What Makes a Good Wealth Manager
Wealth Accumulation, Protection and Succession
Wealth Management in Historic Perspective
Recent Industry Trends
Types of Wealth Management Service Providers
The role of wealth providers
Wealth Management in Asia: A Relevant Profession
Why Wealth Management Matters

Key Concepts

Trust
Fiduciary Responsibility and Ethics
Conflicts of Interest
Onshore versus offshore wealth management

Insurance

Personal Liability, Personal Property, and Business Insurance
Introduction to life insurance
An Overview of Insurance
Insurance – An Introduction
The Insurance Contract
Life Insurance
Health Related Insurance
Personal Liability Insurance
Insurance and Wealth Management

View an example course 1

View an example course 2

Skills

Becoming a trusted adviser
Being An Effective Wealth Manager
Building Trust to Add Value to Clients & Their Portfolios
Conducting Successful Meetings
Coping With Stress
Creating a Successful Service
Creating an effective Financial Plan
Define your USP
Delivering Bad News
Delivering the Service
Doing Business in Asia
Effective Listening
Effective Questioning
Grooming and Fitness
Handling Objections
Obtaining Feedback
Presentation Skills
Prospecting
Sales: Best Practices
Sales: Not-So-Best-Practices
Self-improvement
The Concept of Trust
Time Management
Winning Referrals

Compliance & Regulation

Anti-Corruption and Anti-Bribery
Anti-Money Laundering for the Back Office
Anti-Money Laundering Hong Kong
Anti-Money Laundering Indonesia
Anti-Money Laundering Malaysia
Anti-Money Laundering Singapore
Anti-Money Laundering Taiwan
Anti-Money Laundering Liechtenstein
Anti-Money Laundering Switzerland
Code of Conduct – Hong Kong
Code of Conduct - Private Banking Singapore
Code of Conduct and Ethics - Malaysia
Common Reporting Standards
Compliance & Business Ethics
Corporate Social Responsibility/ESG
Cross Border Sales Guidelines: Hong Kong
Cross Border Sales Guidelines: Singapore
Cyber Security
Cybersecurity Singapore
Data Protection Hong Kong
Data Protection Switzerland
Data Protection Singapore
Data Protection Malaysia
Risk Management
Ethical Fiduciary Responsibility
FATCA
Fraud Prevention
Guidelines on FAIR dealing in Singapore
Guidelines on Fit & Proper Criteria for Financial Advisers
Guidelines on Standards of Conduct for Financial Advisers
KYC Essentials Hong Kong
KYC Essentials Singapore
Market Abuse - Hong Kong
Market Abuse - Singapore
Mis-selling and Suitability – Hong Kong
Mis-selling and Suitability – Singapore
Sanctions

Investments

Advanced Fixed Income
Advisory Services
Alternative Investments
Asset Allocation and Diversification
Behavioral Finance
Behavioral Finance
Benchmark
Cash Flow Modeling
Collectibles
Commodities
Compounding
Contingent Convertible (CoCo) Bonds
Convertible bonds
CREDIT
Currencies
Daily Range Accruals
Derivatives
Derivatives in Wealth Management
Derivatives: Client considerations
Discretionary Management
Discretionary Portfolio Management
Dual currency investments
Economic Indicators
Equity Accumulators and Decumulators
Equity income
Equity Indices
Equity Linked Notes: Reverse Convertibles
Equity Valuation
ETFs
Exchange Rate
Exchange traded products: ETFs
Financial Derivatives
FX Accumulators And Decumulators
FX Global Code of Conduct
Government Bonds
Hedge Funds
Hedge Funds
Interest Rate
Introduction to bonds
Introduction to equities

Investments

Introduction to Equities
Introduction To Fixed Income
Introduction to FX
Introduction to Mutual Funds
Investing in commodities
Investment basics
Investment Math
Investment Returns
Investment Risks
Investment Styles
IPO
Islamic Finance
Liquidity
Macro Economics
Managing Investment Risks
Market Timing
Measuring Investment Risks
Model Portfolios:Asset Allocation
Money Markets
Nature and Benefits of Discipline
Portfolio Management Theory
Portfolio Reviews
Private Equity
Private Equity
Real Estate
Responsible Investing
Responsible Investing
Risks of Borrowing
Short duration bond investing
Short Selling
Technical Analysis
Understanding Discretionary Portfolio Management
Understanding ETFs
Understanding Gold
Using ETFs
Using Structured Products
Vanilla Options
Who Should Be Managing the Assets?
Why Borrow?
Why Invest?
Why Invest?
Yield Curves

Wealth Solutions

The High Net Worth Individual

Understanding the Rich
Life Stages
Common Headaches of the Rich
The Life Plan
The Financial Plan
Succession Planning
Importance of citizenship and residence planning

Wealth Psychology

The 'Curse' of Wealth
Wealth Transfer and Psychology
Business Transfer and Psychology
Raising Affluent Children: The Challenges
Raising Affluent Children: Best Practices
Family Governance
Family Offices
Philanthropy
Wealth Psychology and Wealth Management

Wealth Structuring

Why Wealth Structuring?
During-Life-Purposes of Wealth Structuring
After-Life Purposes of Wealth Structuring
The Will
The Offshore Company
The Trust
Applications of Trusts
The Foundation
The Insurance Wrapper
Wealth Structuring – What You Need to Know
Wealth Structuring and Wealth Management
Applications of Trusts
Practical steps for wealth transfer
The components of long-term wealth plans

- Augmented with knowledge review and course assessment questions for CPD / CPT
- Training is available for users to access at their own convenience, 24/7
- We continually upgrade and enhance the content, functionality and technology
- Enriched with case-studies and practical tips
- Optimal instructional design to enhance the learning experience
- Consistent design and format across all platforms - desktop and mobile
- Created to provide an interactive, engaging user experience
- Content is timely, concise, robust and curated in collaboration with experts

ACCREDITATION

Hubbis is an IBF accredited training provider.

We have accredited **IBF-STS** and **FA-CPD** training available.

The accredited training can be purchased as individual programmes.

Why we are different

» **ASIA-SPECIFIC CONTENT** - Hubbis is the only provider of online learning that is solely dedicated to the Asian wealth management industry.

» **VALUE FOR MONEY** - We want to ensure learning is affordable and accessible to everyone in the wealth management industry. We never charge any fees for on-boarding or end-user training.

» **GOVERNANCE** - We constantly review & upgrade the relevance and timeliness of the platform - this includes adding new courses every week, adapting functionality to the needs of different markets and types of institutions, and improving the technology. We also regularly bring together - via our events and private thought-leadership discussions - market experts on all topics. This enables us to check our existing content and plan new courses.

» **COLLABORATION** - We collaborate with more than 150 existing partners on the learning platform - getting feedback and incorporating new ideas for content, functionality and technology. Plus, we work, across the overall Hubbis business, with more than 300 partners - continually discussing with them their problems to understand the reality of the market.

» **EDUCATION** - The material we produce is USEFUL and USEABLE. It helps wealth managers and other practitioners meet their continuing professional development needs in a practical and robust way.

» **CONTENT DEVELOPMENT** - We source content and insights from the most respected and experienced practitioners at the leading firms in the market and package it for our learning platform REPORTING - We enable users to generate individual, team and annual training records on demand. We offer built-in, customised reporting tools to quickly meet regulatory requirements.