CFA Institute Conference: Wealth Management 2019

2–3 April 2019
The Westin Fort Lauderdale Beach Resort
Fort Lauderdale, Florida, United States

The attendee will

- explore and discuss strategies to address real and perceived political risk;
- learn how technology is changing the business of wealth management, including client communication and engagement;
- understand the impact of behavioral biases in client perceptions about wealth and risk;
- learn to define and promote his or her value proposition in the wealth management market;
- explore current trends in global capital markets and capital market–related policy; and
- learn latest practices related to investment firm and practice management, including standards of service, managing client relationships, and client reporting.

Credit Amount

- CFA Institute CE Program: 11 credit hours
- NASBA: 12.5 credit hours in the content area of Finance

Additional Information

- Delivery Method: Group Live
- Program Level: Intermediate
- Prerequisites: Finance
- Advanced Preparation: None

For additional information on Wealth Management 2019, please visit the conference page.

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