

Core Details

09.30am — 5.00pm
City of London

 6 CPD Hours

To Book

Call

0203 178 4230

Email

stuart.bull@fstp.co.uk

Online

fstp.co.uk

Your Consultant



**Lorraine
Mousley**

Lorraine brings over 30 years of experience in the retail banking and financial advice sector, having worked predominantly in the Banking, Bancassurance and Independent Financial advice sector. Lorraine has extensive experience in all aspects of retail financial services, and a highly successful track record as a Financial Adviser, Area Manager and Training Design and Delivery Consultant. This gives her strong customer focus, employee engagement, and business awareness of retail clients and the issues they face. As a Chartered Financial Planner, Lorraine was also one of the first two people in the country to have fully completed the CII Regulated Diploma. Lorraine has extensive training experience at Regulated Diploma level, across all subjects, and is an Accredited CII Trainer.

Understanding Structured Products

Structured Products are popular with many customers as they are fixed-term investments that provide a return based on the performance of a specific market or assets. However there are various types of structured products and they are not always the easiest for customers to understand. That is why it is crucial for all your staff members who are involved with these products to be fully aware of the benefits and the risks involved to your clients.

The FCA has found that many customers are struggling to understand the complex features common to many structured products. This is causing them to frequently overestimate the potential returns available from the product resulting in a negative impact on their decision-making. The complexity can come from the design of the product or advice that does not take into account the client's appetite for risk and prior knowledge/experience of these types of products.

Benefits

Attending this session will allow delegates to:

- Provide a more comprehensive overview of structured products through a deeper understanding of the fundamentals.
- Outline the key benefits as well as associated risks for customers taking out these products.
- Have a better understanding of the taxation requirements that must be considered.
- Have a better understanding of the key regulatory issues when providing advice on these products to clients.

Who the course is targeted at?

All members of staff involved with structured products. It will provide an excellent overview for any member of staff involved in these products, from design through to sales, as well as a great introduction for any new starters. And not forgetting excellent CPD

Understanding Structured Products

Cost

£595/ person +VAT £714

A discount of 10% per person is available when booking for 2 or more delegates on the same course in a single booking

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In-house Course?

This course works well as an in-house event, contact us to discuss your needs on 0203 178 4230 or email info@fstp.co.uk



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The CPD Standards Office
 CPD PROVIDER: 21920
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Agenda

Session	Learning Outcomes
History of structured products	<ul style="list-style-type: none"> Understand the background and origin of structured products
What are structured products?	<ul style="list-style-type: none"> Gain an understanding of the purpose and primary objectives of structured products as a potential investment solution for clients
How do structured products work?	<ul style="list-style-type: none"> Be able to outline in client centric terms how structured products are formed
What types of structured products are available?	<ul style="list-style-type: none"> Gain an understanding of the main types of structured products available and how these may suit a client's needs and objectives
What are the benefits of investing in them?	<ul style="list-style-type: none"> Outline the main advantages and benefits of investing in structured products
What are the risks and drawbacks of investing in them?	<ul style="list-style-type: none"> Outline the main risks and drawbacks of investing in structured products
Taxation Considerations	<ul style="list-style-type: none"> Be able to articulate the different taxation considerations dependent upon structured product type
Potential Regulatory issues	<ul style="list-style-type: none"> Understand the main regulatory concerns and issues when recommending structured products to clients