

## Level 1

80 hours

### Financial Products

#### Capital Markets

Equity Markets  
Fixed Income Money Markets  
Fixed Income Debt Markets  
Derivatives – Futures/Forwards  
Derivatives – Options/Swaps/  
Mortgages

#### Retail Products

Banking Products  
Banking Channels  
Corporate Banking Products  
Foreign Exchange  
AML KYC

#### Mutual Funds

Mutual Fund Basics and Structure  
Legal & Regulatory Environment  
Offer Document  
Fund Distribution  
Selecting the right mutual fund

#### Alt. Products

Insurance Products  
Loan & Debt Management  
Real Estate  
Estate & Tax Planning

#### CISI ICWIM Certification

International Certification in  
Wealth and Investment  
Management  
CISI ICWIM Certification - Part 1

## Level 2

80 hours

### Investment Planning & Relationship Skills

#### Framework

Investment Vehicles  
Indian Tax Laws  
Legal Framework  
Managing Investment Risk  
Technology Tools  
(CRM, Doc Mgmt)

#### Investment Planning

Client evaluation methods  
Economic factors  
Risk & return analysis  
Valuation techniques

#### Personal Disciplines

Disciplines to assure consistent  
action & effective results  
Prospecting, Nurturing,  
Following up, Time Management

#### Relationship Skills

Build relationships & skillfully  
adapt to all types & styles  
of customers  
Active listening  
Building trust  
Consultative Selling  
Excellence in service requests

#### CISI ICWIM (India) Certification

India Focused Certification in  
Wealth and Investment  
Management  
CISI ICWIM Certification - Part 2

#### NISM Certification

Investment Advisor Certificate

## Level 3

20 hours

### Interpersonal Skills

#### Communication

Basics of Business  
Communication  
Verbal & Non-verbal  
Communication  
Use of Native Language  
Email Writing  
Managing Conference Calls

#### Etiquette

Corporate etiquette  
Grooming  
Business Attire  
Handshakes & Greetings

#### Simulations

Practical mocks with  
customers simulations

- Act of Closing-‘Small steps first’
- Objection handling
- Negotiation skills