

FINANCIAL MANAGEMENT

Registered Financial Specialist (RFS)

The Registered Financial Specialist (RFS™) training program is designed to enhance technical knowledge and train on private investment skill sets in order that the financial team can confidently frame sales conversations with clients and prospects. Covering financial planning, asset management, investment advising, and insurance topics, the RFS™ is the entry-level qualification on IFIS's Wealth Management program.

Certification Issued By**International Financial Institution Society (IFIS - USA)**

IFIS is a global network of professional services organization providing Financial, Client Solutions, Assets Management and Accreditation services. We have 62,000 outstanding professionals working together to deliver value in 15 countries.

**Membership from****HIGH AUTHORITY COUNCIL FOR ARAB BANKERS (HACAB)**

HACAB is a world leading professional membership organisation that promotes, develops and supports banking professionals worldwide. We provide qualifications and professional development, share our knowledge, insight and technical expertise, and protect the quality and integrity of the banking and finance profession.

**Who Should Attend?**

- ✓ Private Bankers Wealth Managers
- ✓ Retail Branch Managers
- ✓ Corporate Account Managers
- ✓ Family Office professionals
- ✓ Brokerage and Market Analysts
- ✓ Investment Advisors and Financial Planners
- ✓ Investment Managers and Analysts
- ✓ Stock Market Professionals
- ✓ Portfolio and Asset Managers
- ✓ Financial Marketing Professionals
- ✓ Heads of Financial Accounts

Eligibility Requirements

You are qualified to take this certification if you have any of the below requirements:

- ✓ Must have at least one year experience in related field
- ✓ Bachelors or Masters Degree

Course Parts

- ✓ Portfolio Management
- ✓ Money Market and Deposits
- ✓ Bonds and Fixed Income Securities
- ✓ Yield Curve and Interest Rate Expectations
- ✓ Brief History of Asset Class Performance
- ✓ Equity Valuation
- ✓ Equity Investments
- ✓ Hedge Funds
- ✓ Private Equity
- ✓ Other Asset Classes
- ✓ The Consultive Sales Process
- ✓ From Lead to Closure
- ✓ Managing the "PIPELINE"
- ✓ Your Network
- ✓ Introduction to Islamic Investments and Funds

How to Register?

- ✓ [Register Online](#) or
- ✓ Fill-up the [registration form](#) and visit the Institute, with the following requirements then pay the necessary fees.
 - passport copy
 - 1 copy of passport size photo
 - eligible certificate copy

Contact Us

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