



Brief Course Descriptions

PART I: ACCOUNTING

The Balance Sheet

This course will introduce you to one of accounting's fundamental documents, the balance sheet. You will learn how to read, create and maintain a balance sheet. You will also learn how a balance sheet works with other financial statements and how it fits into the annual report.

Income Statement

This course will introduce you to the income statement and start to explore its links to the balance sheet. You will learn about the different income statement accounts, what they mean and where they come from.

Current Assets

This course will take you through the current assets section of the balance sheet. You will learn to identify different accounts and their relevance to a company's financial status. You will also learn how different companies deal with inventory, one of the key accounts in current assets.

Long Term Assets

This course will take you through the long-term assets section of the balance sheet. You will learn what defines a long-term asset and the different kinds of long-term assets.

Working Capital

This course will introduce you to working capital and operating working capital, two numbers that are very interesting to financial analysts. You will learn how to calculate working capital and operating capital and what the difference between the two means. You will also learn how financial analysts use these figures to analyze the financial status of a company.

Income Statement Analysis

This course will take you further into the income statement and its various accounts. You will learn about the difference between accounting for taxes and for shareholders. You will also be introduced to using ratios to analyze and compare companies.

Cash Flow Statement

This course will introduce you to the different sections of the cash flow statement. You will learn why financial analysts are interested in the cash flow statement and how to compile a cash flow statement. In addition, we will introduce you to projected financial statements and calculations based on those.

Ratio Analysis

This course will give you a more in-depth look at how financial analysts use ratios to analyze and compare companies. We will calculate and then use various ratios that indicate the financial status of a company.

UK Accounting

This course is an introduction to UK accounting standards. You will learn how UK and US accountants differ in financial statement terminology and presentation. You will also learn the differences in accounting standards which are important when comparing companies.

FASB Accounting Standards Codification

This course is aimed at individuals with introductory accounting, GAAP and financial statement knowledge. This course will explain the Codification, discuss the reasons FASB created the Codification, outline the structure of the Codification hierarchy, and explain how to reference accounting standards in financial statements according to the Codification.

PART II: BANKING SALES SKILLS

Building and Retaining Customer Relationships

Building and Retaining Customer Relationships teaches students the knowledge and skills necessary to start, organize, maintain, and execute a sales portfolio. The course prepares and prompts students to implement a sales portfolio comprised of client records at their work as a final step. Throughout the course, students will have opportunities to practice what they are learning through a series of exercises and projects.

Calling on Small Business Customers

Calling on Small Business Customers teaches students how to plan effective calls with small business clients. It begins with an exploration of small business fundamentals including business legal structures/characteristics, types, needs/expectations, and operating/life cycles. Students then learn the Call Planning Model steps, and practice applying them with fictitious clients.

Cross-Selling Deposit Products

Cross-Selling Deposit Products teaches students how to sell deposit products effectively. Students will learn how to conduct sales interactions with clients, and how to prepare for effective cross-selling to maximize sales of deposit products and ensure client satisfaction. Course exercises provide opportunities for students to practice cross-selling concepts through realistic client scenarios.

Effective Referrals

This course provides branch or operations personnel with the skills to provide confident and effective referrals. By the end of the course, students will be able to identify sales and service opportunities and use benefits statements to make the referral.

Introduction to Relationship Selling

Introduction to Relationship Selling introduces students to the relationship selling process, and the skills and techniques that support a client needs-focused sales approach. Students will learn how to prepare for the sale and conduct an effective sales interaction with clients, and an overview of each step in the relationship selling process to guide sales interactions with clients.

Servicing and Growing Small Business Relationships

In Servicing and Growing Small Business Relationships, students will learn techniques to nurture a business relationship with a small business once it has been established. This course begins with an overview of small business fundamentals, including the different legal structures of small businesses, types of small businesses, and the needs and expectations of small businesses. From there, students will learn different types of information to monitor a relationship with a small business: financial information, client records, and other resources. Finally, students will learn why site visits are important and how to uncover different kinds of information on a site visit.

Sales Coaching in the Bank

Sales Coaching in the Bank will help you identify daily sales coaching opportunities. It will also introduce basic techniques you can use to incorporate knowledge and skill building into your team's workday routine. In addition, this course will compare service-focused and sales-focused positions within your organization. You will learn to identify the knowledge and skills needed to support your team and how to develop a strategy that supports knowledge and skill building for each job function.

Successful Sales Campaigns

Successful Sales Campaigns teaches step-by-step techniques for involving each staff member in various aspects of the sales campaign. You'll learn how to set campaign objectives and how to use demographic information to identify clients who are in need of the product you are promoting. You'll learn how to shop competitive banks and incorporate what you learn into your campaign methods. The course provides methods for handling simultaneous campaigns, preparing campaign advertising, and developing promotional material to attract clients' attention to the product or service. In addition, you'll learn how to introduce the sales campaign to your staff and how to hold each individual accountable for certain campaign responsibilities. You will also learn how to motivate your staff by rewarding them for their successes. Finally, you will explore the many tracking tools used to evaluate performance and the success of the campaign.

PART III: COMPLIANCE

Anti-Money Laundering

This introductory course will provide you with an understanding of how the money laundering process works. You will become familiar with the latest laws that regulate anti-money laundering compliance for financial institutions and businesses. In addition, you will be given interactive, real life scenarios that will help you build your experience in recognizing the red flags that signal money laundering activity.

Anti-Money Laundering: Securities Broker/Dealers

This course focuses on anti-money laundering issues, standards, and procedures for securities broker/dealers.

Anti-Money Laundering: Commercial and Private Banking

This course focuses on anti-money laundering issues, standards, and procedures for commercial and private banking.

Bank Secrecy Act

This course introduces employees of financial institutions to the Bank Secrecy Act and the reporting responsibilities that come with it. Students will learn to complete and submit required Bank Secrecy Act reports, explain the timeframes and procedures for maintaining Bank Secrecy Act reports, and finally, how to explain to clients why Bank Secrecy Act reports are required.

Privacy for Customer Contact Personnel

In Privacy for Customer Contact Personnel, students will learn the everyday privacy issues that customer contact staff are faced with on a regular basis. It covers the existing Right to Financial Privacy Act as well as Regulation P, the newest consumer privacy guidelines resulting from the passage of the Gramm-Leach-Bliley Act. Students will learn the terminology used to discuss the privacy issue, including opt-out, consumer vs. customer and how to answer consumer questions about their privacy rights.

Real Estate Settlement Procedures Act

In Real Estate Settlement Procedures Act, students will learn how identify activities, disclosures and specific job responsibilities that are required by the Real Estate Settlement Procedures Act (RESPA), one of the many consumer protection laws that govern financial institutions and mortgage lenders. After an overview of the history of the law, its purpose, and the extent of its coverage, the course identifies the eight RESPA disclosures required at different stages of the home buying process and provides examples of each form. After completing this course, students will be able to protect themselves, their financial services institution, and, most importantly, the consumers they assist in the home buying process.

Equal Credit Opportunity Act - Regulation B

Equal Credit Opportunity Act - Regulation B teaches students to evaluate an applicant's creditworthiness within the boundaries of the Equal Credit Opportunity Act. The course begins by describing the purpose and coverage of the Equal Credit Opportunity Act, and then reviews what a bank and its employees must do regarding the taking and processing of loan applications, including acceptable factors. Students will learn about prohibited bases for evaluating an application and required notifications. The course concludes with a discussion of other bank compliance issues, including the requirements for reporting credit information, record keeping, and the consequences of noncompliance.

Expedited Funds Availability Act (Reg CC)

In Expedited Funds Availability Act (Regulation CC), students will learn key components of the Expedited Funds Availability Act (Regulation CC). Students will gain general knowledge of availability schedules used on transaction account deposits and the general conditions when EFAA allows holds to be extended. Students will also learn some of the basic requirements created by the Federal Reserve Board as part of EFAA for paying and returning checks.

Fair Credit Reporting Act

Fair Credit Reporting Act covers compliance requirements under the Fair Credit Reporting Act (FCRA). Students will learn about the purpose of the FCRA, and review the types of transactions and exemptions covered under it. The course also teaches students the requirements, responsibilities and rights outlined under the Act, including special guidelines for the sharing of consumer information between affiliates, as well as the actions students must take to help ensure compliance with the FCRA.

Fair Lending

This course introduces students to the practices and principles of fair lending, and demonstrates how to avoid discriminatory and unfair lending practices when interacting with clients. Students will learn about the relationship between unfair treatment and illegal discrimination, as well as the essential points of the five federal fair-lending laws and the Joint Policy Statement on Discrimination in Lending. Throughout the course, students will have opportunities to practice standard client interaction scenarios that help ensure compliance with fair-lending laws.

FATCA Compliance - An Overview

This course describes the background, context and implications of FATCA, which is a law designed to identify US persons holding financial assets abroad. This course aims to help foreign financial institutions (particularly hedge funds, which may not have extensive internal compliance departments) to identify what needs to be done to achieve compliance.

Bank Bribery Act

Do you remember the last time you were asked to acknowledge a copy of the bank's code of conduct or similar policy statement? Can you recall the content? In this course, you will learn about the Bank Bribery Act, including its history, purpose, potential conflicts of interest, and how to comply with the requirements of the law.

Bank Protection Act

This course will help you to understanding your own financial institution's security procedures—a critical part of every employee's job responsibilities. While the steps in the security procedures or the type of security devices used may vary from one financial institution to another, the fact remains that any federally insured financial institution must establish certain security efforts as outlined by the Bank Protection Act (BPA).

Electronic Fund Transfer Act – Regulation E

This course provides a detailed introduction to the Electronic Fund Transfer Act and Regulation E. When banks first began to offer electronic banking services, Congress and consumer groups raised concerns about the potential for fraud and errors that could result from such transactions. Their concerns resulted in the enactment of the Electronic Fund Transfer Act and the implementation of Regulation E. The requirements contain very strong protections for consumers.

Extending Credit to Bank Insiders - Regulation O

This course provides detailed information regarding the extension of credit to bank insiders and Regulation O. When the Federal Reserve was created in 1913, all national banks were required to become members and state banks were allowed to become members. While membership carried certain privileges and powers to borrow from the Federal Reserve, it also added restrictions. These included limits on lending to bank insiders to prevent conflicts of interest inside the bank. Regulation O governs such activities.

Fair Housing Act

As a banker, fair lending laws require you to treat all of your clients equally. By following the requirements of the fair lending laws, you are also providing good customer service, which is a good business practice within your organizations. The Fair Housing Act (FHA) is part of the fair lending laws and prohibits discrimination based on certain factors by any person whose business includes engaging in residential real estate-related transactions. The FHA prohibits discrimination based on: race, sex, color, religion, national origin, familial status, or handicap (disability). This course will help you to understand the requirements of the FHA and to act accordingly when serving your clients in residential real estate-related credit transactions.

Flood Disaster Protection Act

As the financier of mortgages, commercial properties, and other properties secured by improved real estate, banks and other real estate lenders are in a key position to require property owners to maintain adequate insurance. For this reason, the Flood Disaster Protection Act of 1973 made it the lender's responsibility to determine which properties are in areas most prone to flooding and further, become the enforcer for the purchase and maintenance of flood insurance protection. The Flood Disaster Protection Act gives bankers less room to evaluate risk by governing what a bank can legally waive.

Office of Foreign Asset Control (OFAC) Regulations: What You Need to Know

This course covers a regulation that deals with every account relationship and transaction that a bank offers its customers. These are the requirements administered by the Office of Foreign Assets Control (OFAC) to prevent hostile targets from utilizing the U.S. financial system.

Truth in Savings Act

Most banks have a number of different deposit products they make available to customers. In the past it was sometimes difficult for consumers to compare products, either within one bank or among several banks. Eventually this led to the passage of the Truth in Savings Act, which requires depository institutions to disclose fees, interest rates, annual percentage yield, and other account terms in a standard manner both before an account is opened and upon the request of a consumer. In this course you'll learn about the Truth in Savings Act and how it affects your dealings with customers.

Basel II Overview

Basel II will make a significant impact on the areas of governance, management, data handling and reporting within all affected institutions. It is important that all managers be aware of the implications and have started planning and implementing the requirements for their institution.

Implementing Basel II: Commercial Banks

Basel II will make a significant impact on the areas of governance, management, data handling, and reporting within all affected institutions. It is important that all managers be aware of the implications and start planning and implementing the requirements for their institution

Implementing Basel II: Investment Banks

Basel II will make a significant impact on the areas of governance, management, data handling, and reporting within all affected institutions. It is important that all managers be aware of the implications and start planning and implementing the requirements for their institution.

Implementing Basel II: Retail Banks

Basel II will make a significant impact on the areas of governance, management, data handling, and reporting within all affected institutions. It is important that all managers be aware of the implications and start planning and implementing the requirements for their institution.

The Dodd-Frank Act

The Dodd-Frank Wall Street Reform and Consumer Protection Act of 2010 is widely considered the most far-reaching piece of legislation covering the financial services sector in many generations. The bill itself is lengthy and covers a broad range of topics. This course aims to discuss the main objectives of the bill and identify the impact the new regulations will have on the financial services industry as it moves towards compliance.

The Essentials of Form PF

This course provides an overview of Form PF, including why the requirement exists and what it is intended to solve. You will learn who is affected by this new regulatory requirement and what is needed in order to achieve compliance.

PART IV: CORPORATE FINANCE

Introduction to Corporate Finance

This course introduces corporate financial theory and principles, which both inform and guide capital budgeting, capital structure and dividend decisions.

Capital Asset Pricing Model

This course defines the concept of risk as it is used in finance and demonstrates how practitioners attempt to quantify risk to better understand their stock investors' expectations. In the eyes of the firm, this risk implies a critical cost that figures into key financial decisions.

Cost of Capital

The cost of capital, a measure of the composite cost of raising money, is an important consideration in finance. It is most commonly used as a hurdle rate in the capital budgeting process, in which resource allocation decisions are made. This course illustrates how to calculate the cost of capital and shows the importance of the inputs used in estimating each component cost.

Introduction to Capital Budgeting

Sensible allocation of limited corporate resources requires an understanding of risk and return and how the measurement of each affects project choice. This course will present a variety of capital budgeting tools used to evaluate potential given projects.

Capital Budgeting -- Deriving the Cash Flows

Corporations use different methodologies for determining whether they will invest in proposed projects. This course details two widely-used capital budgeting approaches--net present value and internal rate of return--and illustrates how to derive the cash flows needed for such analyses.

Capital Structure

Among the most important decisions in corporate finance is the proportion of debt and equity, which will be used to finance projects. This course shows how to determine the optimal debt/equity mix for a company and illustrates the implications of adopting that mix.

Dividend Policy

As a firm generates cash flows from operations, it must decide how to use the cash in the best interests of the shareholders. This course explores the factors and considerations that go into this process, also known as the dividend decision, and provides a framework for analyzing the amount (if any) paid out.

Hedging Interest Rate Risk with Derivatives

This course describes how derivative products such as futures, forwards, swaps, and options can be used to mitigate interest rate risk. Each product is discussed within the context of an example that reflects its real-world application. The first lesson focuses on short-term interest rate risk scenarios as hedged by forwards, futures, and options. The second lesson focuses on long-term interest rate risk scenarios as hedged by futures, swaps, and swaptions.

Mergers and Acquisitions

No area of corporate finance generates as much drama, interest and controversy as the acquisition of one company by another or the merger of two companies. However, once you get past the publicity, a merger or acquisition is just another investment that must be analyzed and evaluated before a sound decision can be made.

This course provides an overview of mergers and acquisitions and the decision-making process that an acquirer should follow when evaluating the potential benefits of a possible deal. You'll learn about making the business case, performing a standalone valuation of the target, valuing the combined entities, the due diligence process, and take-over defenses. The course is ideal for accounting and financial professionals who want a thorough understanding of Mergers and Acquisitions and how to evaluate proposed deals from both strategic and financial points-of-view.

Initial Public Offerings

This course provides an introduction to why and how private companies go public. It highlights the basic steps in bringing a new issue to market and includes an overview of the documentation required, the most common pricing alternatives, and typical marketing activities.

Understanding a CFO's Challenges

Managing risk is a key concern for Chief Financial Officers (CFOs). To discuss risk management with CFOs effectively requires understanding their role and the challenges they face. In preparation, you must know how the company measures performance and how well it is doing financially. This course helps you make your risk management calls more productive. With this knowledge, your discussions with the CFO can focus on digging deeper into his or her concerns and identifying specific areas where you can assist.

PART V: CREDIT

Cash Flow Analysis

This course will introduce you to free cash flow and net internal cash flow, methods of cash flow analysis which give a better indication of a company's financial health than simply looking at earnings, the cash flow statement, or EBITDA.

Developing Credit Solutions

Bank Relationship Managers are chartered with growing their lending business profitably. This course improves the credit analysis and client relationship skills of Bank Relationship Managers. Specifically designed for professionals who target small to mid-size business clients, this course helps managers diagnose a client's credit needs, and develop the most appropriate solution for the client as well as the bank. A series of vignettes based on real small business banking relationships introduce the learner to the fundamentals of financial analysis and how to look for the compelling "story" behind successful credit relationships. How to read and analyze a balance sheet and income statement are covered in detail.

Loan Structuring

This course will introduce you to the elements of structuring a loan from both the borrower's and the lender's point of view. You will learn about the features of several typical loan products in commercial lending and gain an understanding of how a lender chooses an appropriate loan through a series of case studies.

Introduction to Credit Risk

This course provides a framework for analyzing credit risks and introduces ways to structure credit instruments to reduce risk. It also provides an understanding of the risk/return relationship in credit risk and how the risk differs from the risks facing an equity investor.

Portfolio Management of Credit Assets

Credit portfolio managers are concerned not only with the standalone risk of individual loans but also with portfolio risk. This is the risk that comes with combining loans into a single portfolio, specifically, that more than one loan in the portfolio will default at the same time. This course describes various tools used by credit portfolio managers to more actively control the risk in their portfolios. Successful credit portfolio management can stabilize a bank's earnings and have a positive effect on shareholder value.

PART VI: DERIVATIVES

Introduction to Forwards and Futures

With both forwards and futures, counterparties agree to exchange an asset on a future date at a specific price determined today. This course explains the similarities and differences between forwards and futures contracts, and illustrates their basic components.

Futures Instruments

Futures contracts can be written on a variety of assets. The underlying instrument determines, among other things, conventions regarding face value, maturity, and settlement. This course outlines the basic characteristics of some of the more common futures instruments and shows how to calculate profit or loss in each case.

Introduction to Swaps

Swap transactions, in which one set of cash flows is exchanged for another, represent one of the cornerstones of derivatives trading. This course covers three types of swaps -- the interest rate swap, the currency swap and the asset swap -- and discusses their applications.

Interest Rate Swaps

An interest rate swap is a popular derivative transaction that consists of an exchange of coupons, typically a fixed rate for a floating rate. This course outlines how interest rate swaps are valued as well as how a dealer determines the price to charge the other counterparty.

Asset Swaps

An asset swap combines an asset sale with an interest rate or currency swap and can serve as a highly effective tool for a company that needs to raise funds. This course outlines how asset swaps are valued and shows how a dealer determines the price to charge the other counterparty.

Introduction to Options

An option is a contract offering the right, but not the obligation, to buy or sell an asset at a predetermined price. Options are the prototypical derivative product. This course introduces options and explains how investors use them to implement various investment strategies.

Introduction to Option Pricing Theory

This course explains how probability and statistics techniques are employed to determine the value of an option--the future price of its underlying asset. Although graphical models are used to detail the fundamental framework behind pricing, there is no attempt to derive precise option values.

Tools for Evaluating Options

Given the uncertainty surrounding option pricing, quantifying and managing the risk of an option is crucial. This course examines the factors that affect the price of an option, and then shows how to isolate them in order to fully assess risk.

Exotic Options

Every organization needs to adopt and implement a risk management process that corresponds to the volatility and gravity of the underlying risk exposures of its business or environment. Sometimes the standard hedging instruments cannot satisfy the organization's specific needs at an efficient cost level.

When this happens, exotic options are often the answer. This course provides learners with an understanding of exotic options, how they can be used by managers to cost efficiently hedge financial price risks, and the risks associated with these relatively complex derivative products. The course will be very helpful for people working with capital markets or derivative instruments, those involved in financial risk management, and those involved in investment decision-making.

Introduction to Credit Derivatives Part 1

This two-part course provides an introduction to the mechanics, pricing, and applications of key instruments in the credit derivatives market. Part One reviews the most widely traded instrument, credit default options and swaps, as well as basket default options and total rate of return (TROR) swaps. Part Two discusses credit spread options and credit linked notes.

Introduction to Credit Derivatives Part 2

This two-part course provides an introduction to the mechanics, pricing, and applications of key instruments in the credit derivatives market. Part One reviews the most widely traded instrument, credit default options and swaps, as well as basket default options and total rate of return (TROR) swaps. Part Two discusses credit spread options and credit linked notes.

Equity Derivatives: Profit / Loss Analysis

Profit/loss analysis allows an investor to assess the conditions under which a financial strategy implements the investor's market view while also offering acceptable profit/loss potential. This course describes how to calculate profit/loss for six equity derivative strategies and considers how these calculations factor into the strategy's final outcome at maturity.

Introduction to Equity Derivatives Strategies

An equity derivative is a financial instrument whose value depends upon the value of an underlying equity reference. This course provides an introduction to six strategies that employ equity derivatives. It outlines the primary components of each strategy, suggests why an investor might use them, and illustrates potential profit/loss outcomes under various market conditions.

Introduction to Energy Derivatives

Energy derivatives are used to hedge the price risk of an underlying commodity. This course introduces petroleum, natural gas and electricity as energy commodities and how to use correlating energy derivatives to hedge. It assumes familiarity with terminology and basic concepts of derivatives.

Eurodollar Futures Strip

Forward rates and Discount Factors are key inputs for the pricing of swaps and other derivative instruments. Eurodollar Futures Strip gives learners an understanding of how forward rates and Discount Factors can be derived from Eurodollar futures prices. This course provides the foundation for more advanced courses in risk management and derivatives, especially those involving derivatives pricing. This course is particularly helpful to those who want to pursue a career in financial risk management or investment management. It will also be useful for anyone involved with capital markets groups or the derivatives desks of banks or other financial institutions.

Caps, Floors, and Swaptions

Caps, floors, and swaptions are over-the-counter financial options that are useful in protecting against financial price risks. Unlike exchange-traded options, they are traded directly by two counter parties who can tailor the instruments to meet their specific individual needs. This course provides an introduction to the basic features of caps, floors, and swaptions and the motivations for using them. This course is an invaluable source for risk managers, traders, portfolio managers, or those who interact with these professionals.

PART VII: EQUITY

Introduction to Equity Valuation

This course introduces valuation techniques that investors use to determine whether stocks are fairly priced.

Introduction to World Equity Markets

This course is designed to review the key characteristics of equity markets outside of the United States. It provides an overview of the most commonly traded instruments, from ordinary shares to international equity to depositary receipts, and discusses the ways in which they are issued and traded in markets around the world. This course is part of the equity and finance basics curriculums. Banking and research analysts as well as brokers and private bankers can take this course to understand better the most important equity markets, in which the products that they deal with are likely to be part of.

Equity Valuation -- FCFF Model

This course profiles the FCFF Model and details the means for discounting Free Cash Flow to the Firm to estimate the value of a company.

The Dividend Discount Model

This course introduces the most popular equity valuation model, the Dividend Discount Model (DDM), and shows how to apply it to different investment scenarios.

Introduction to Economic Profit

Corporate managers are charged with using all of their firm's resources for the greatest benefit to the firm. This means that the primary objective of every managerial decision - no matter how large or small - should be to maximize the value of the firm, also known as shareholder wealth. In practice, however, true firm value is hard to measure and therefore difficult to maximize. Recently, economic profit has gained prominence as a decision tool that improves upon traditional performance measure in capturing overall firm value. This course explains economic profit and how it can be applied to the investment management process.

Calculating Economic Profit

Business and investment managers are constantly searching for tools that will enhance their ability to make decisions. Economic profit, also known as Economic value added or EVA, has been heralded as simple to communicate and superior to traditional performance measures in measuring true firm value. For all the talk about its simplicity, however, economic profit can be difficult to calculate and to apply consistently across companies. This course explains that financial statement items are particularly important in deriving economic profit and shows how the economic profit is calculated.

Technical Analysis

This course examines how to evaluate market price and volume data in order to uncover technical patterns and to predict future price behavior. It includes an overview of the key price patterns and indicators used by technical analysts today, and the tactics by which analysts convert market data into more profitable trading practices.

PART VIII: FINANCE BASICS

Time Value of Money

Among the most primary concepts in finance is the time value of money: that a sum of money today (present value) is not worth the same amount tomorrow (future value). This course explains the mechanics of measuring and comparing present and future values.

Yield

In finance, yield quantifies the relationship between present value and future value in terms of a rate per year. This course explores the nature of yield and its relevance to basic financial concepts.

Yield Analytics

This course profiles numerous tools used to determine how present value will respond to changes in yield.

Introduction to Securities Markets

Governments and corporations raise funds by issuing cash securities in exchange for promising to pay a series of cash flows to investors. Cash securities take one of two forms: debt or equity. This course focuses on how various types of cash securities work in today's markets, where they are sold and how they are structured and priced.

Fundamentals of Economic Indicators

At first glance, the economy may seem predictable only for its unpredictable shifts. Through the use of economic indicators, which indicate past, present and future activity, the economy becomes a more defined and ordered space. This course profiles several U.S. economic indicators included in reports published regularly by various government agencies. We will also learn how the Federal Reserve uses economic indicators to make decisions about the economy.

Introduction to Investment Banking

This course introduces the business of investment banking by exploring the structure and functions of a typical investment bank. It discusses the roles and responsibilities of individual banking departments, with an emphasis on how departments work together to meet the needs of their clients and to generate revenues for the bank. The course also describes the ways in which investment banks manage price risk and comply with banking regulations.

Collective Investment Schemes in the UK

This course is an introduction to collective investment schemes in the UK, including unit trusts, investment trusts, and hybrid structures such as OEICs. It covers the structure and pricing of these collective investment schemes, as well as the details investors consider when choosing a fund.

PART IX: FINANCIAL ADVISORY

Investing in Money Market Instruments

This course is a basic introduction to money market instruments. You will learn about different types of money market instruments and why investors choose them. Upon completion of the course, you will have tools to discuss money market instruments with your client as they relate to the client's portfolio as a whole.

Investing in Bonds

This course is a basic introduction to fixed income investments. You will learn about different types of bonds, why investors choose bonds and how bond prices change. Upon completion of the course, you will have tools to discuss bonds with your client as they relate to the client's portfolio as a whole.

Investing in Equity

This course is a basic introduction to equity investments. You will learn about different types of equity, why investors choose equity and how investors choose stocks. Upon completion of the course, you will have tools to discuss equity with your client as it relates to the client's portfolio as a whole.

Fundamentals of Mutual Funds

This course will provide an overview of the mutual fund industry, the types of mutual funds, and the front- and back-end mutual fund operations.

Investing in Hedge Funds

This course will introduce you to investing in hedge funds. You will learn what a hedge fund is, how hedge funds make money, and how risk and return are assessed. In addition, you will be introduced to different types of hedge funds and some of their basic strategies.

Alternative Investments

This course is an introduction to alternative investments. You will learn about the various types of alternative investments including: real assets, venture capital, derivatives, exchange funds and hedge funds. Upon completion of the course, you will have tools to discuss alternative investments with your client as they relate to the client's portfolio as a whole.

Investment Principles

This course will introduce you to the basics of investing. Topics covered include risk, return and time; some time-related strategies; and an introduction to asset allocation.

The Human Side of Investing

This course examines how decision making is influenced by the emotions and experiences of the parties involved in the process of selecting and managing an investment portfolio. The course will also provide you with tools to moderate and put into perspective the emotions and experiences that lead to poor decision making.

Asset Allocation

This course will provide you with a recipe for selecting and distributing asset classes in an efficient portfolio.

Managing Client Expectations

This course outlines a four step cyclical process for managing the advisor/client relationship.

Credit Analysis for High Net Worth Individuals

This course will introduce you to the process of credit analysis for high net worth individuals.

Lending against Marketable Securities

This course will present the process of extending credit facilities against a portfolio of marketable securities.

Introduction to Performance Measurement

This course will present modern approaches to performance measurement.

PART X: FIXED INCOME

Introduction to Bonds

This course introduces bonds and basic bond concepts including accrued interest and bond price calculations.

Introduction to World Bond Markets

This course is designed to review the key characteristics of bond markets outside of the United States. It provides an overview of the instruments traded and discusses the primary features and functionality of two segments that dominate the market: government bonds and Eurobonds.

Short-term Debt Securities

Short-term debt securities are debt instruments with maturities of less than one year. This course examines the intricacies of short-term securities, which play a crucial part in the bond market.

Long-term Debt Securities

This course looks at debt securities with terms of more than one year and provides the perfect compliment to *Short-Term Debt Securities*.

Bond Yield

This course applies the principles of yield, also known as the general method used for determining average rate of growth of value, to the specific case of bonds.

Bond Duration

This course explains how duration is used to measure different types of risk, including market risk and reinvestment risk, which affect the volatility of bonds.

Portfolio Duration

This course builds on *Bond Duration* by using duration to value an entire portfolio of bonds.

Bond Price Sensitivity

This course instructs how, in addition to duration, bond investors can use other methods, such as DV01, convexity and modified duration, to measure a bond's risk.

Bond Price Sensitivity-Global

This course instructs how, in addition to duration, bond investors can use other methods, such as bpv, convexity and modified duration, to measure a bond's risk.

The Fixed Income Repo Market

This course explains how much of a bond dealer's portfolio is paid for with borrowed money through the repo market.

US Treasury Bond Auctions

This course covers all the phases of a US Treasury auction, from the initial auction announcement to the final results announcement. It also explains the Treasury's issue cycles, conventions and coupon roll transactions.

Treasury Inflation-Protected Securities (TIPS)

This course introduces Treasury Inflation Protected Securities, or TIPS, which were designed to protect investors from inflation as well as lower the Treasury's borrowing costs.

Introduction to Asset-Backed Securities

This course provides an introduction to securitization, a fast-growing sector of the capital markets, focusing on the segment known as asset-backed securities (ABS). It includes an overview of the securitization process, the common asset types and structural features underlying ABS, and the evaluation tools used by investors to assess ABS relative to other fixed income securities.

Introduction to Mortgage-Backed Securities

This course provides an introduction to the largest segment of the asset-backed security market: mortgage-backed securities (MBS). It includes a discussion of mortgage loan cash flows as they relate to MBS cash flows; potential market behaviors and risks in light of prepayment optionality; various methods for evaluating MBS prior to investing; and definitions of the various product types

PART XI: FOREIGN EXCHANGE

Introduction to Foreign Exchange

The foreign exchange market represents the largest, most liquid market in the world today, operating over-the-counter around the clock. This course offers an explanation of currency exchanges, necessary for anyone concerned with financial markets in the 21st century.

Forward Foreign Exchange

This course demonstrates how you can use the forward rate to lock in the exchange rate for a specified future date, eliminating the risk that the currency market will move against you. It explains how forward exchange rates are calculated, and shows some examples of how forward foreign exchange contracts are used in today's marketplace.

Barrier Options

This course introduces the essential features of simple barrier currency options including directional trading and hedging applications, comparisons with OTC vanilla currency options, and intuitive valuation. Lesson 1 explores regular knock-outs and knock-ins. Lesson 2 covers reverse knock-outs and knock-ins.

Vanilla Currency Options

This course introduces the over-the-counter vanilla currency option. It explains basic option concepts and terminology and steps through the option life cycle. It explores directional trading and hedging applications, comparing payouts with the underlying foreign exchange instruments, and introducing elements that underpin option pricing and valuation.

Hedging Currency Risk with Derivatives

This course examines currency risk and compares alternative hedging strategies using forward contracts and over-the-counter currency options. It also explores techniques for reducing protective premium costs through the use of structured hedges involving vanilla and barrier options.

PART XII: FUNDAMENTAL BUSINESS SKILLS

Business Etiquette

The Business Etiquette course introduces new employees to the four guiding principles of business etiquette. Students will learn to introduce themselves or others appropriately to reflect professional hierarchy, describe professional dress code and the effect of not following the code, explain how workplace behavior can affect others, and finally, understand how the rules of business etiquette apply to work situations out of the office.

Managing Time at Work

In Managing Time at Work, you will learn how to make your time at work more productive. You'll learn to create daily plans that focus your energies on business priorities in your workday. Additionally you'll learn techniques to manage your work area, interruptions, telephone calls, and other daily activities that take valuable time away from your workday. You'll be able to customize these steps and techniques into a daily planning system that works for you. By understanding these techniques and constructing your own plan, you'll be more productive.

Dealing Effectively with Co-Workers

Dealing Effectively with Co-Workers focuses primarily on behavior among co-workers. This course introduces information about social behavioral styles and how the different styles affect communication among co-workers. Students will identify their own base preference group and learn what creates the challenges with his/her behavioral opposite. Students will also learn strategies and guidelines for dealing with difficult co-workers and the resulting conflict.

Ethical Issues for Bankers

Ethical Issues for Bankers prepares students to meet the ethical standards expected of financial services professionals. Students will learn the general guidelines that determine banking ethics, gain the knowledge and skills needed to perform ethical decision-making, and be prepared to observe their institution's code of conduct and Federal laws.

Students will also explore typical ethical dilemmas that tend to occur in financial institutions, and learn how to apply a thoughtful three-step approach to such dilemmas.

PART XIII: INSURANCE

Insurance Overview UK

This course offers an in-depth introduction to insurance in the UK. You will learn the basic principles of insurance, and be able to identify all the available products in both general and long-term insurance. The course also offers a look at the insurance market in the UK, including typical types of insurers, special types of insurers, and insurance distribution. You will also learn the details of three key jobs in the insurance industry: the actuary, the underwriter, and the claims manager.

Insurance Overview US

This course offers an in-depth introduction to insurance in the US. You will learn the basic principles of insurance, and be able to identify all the available products in both general and long-term insurance. You will also learn the details of three key jobs in the insurance industry: the actuary, the underwriter, and the claims manager.

Long-Term Insurance: Pricing and Underwriting

This course is an introduction to pricing and underwriting in long-term insurance. The course will explore the actuary's role, including factors that affect setting standard premiums and the specifics of pricing for disability insurances and annuities. The second part of the course delves into the underwriter's role of assessing individual risk and rating lives, including options available for different types of lives.

Reinsurance: Markets and Methods

This course is an introduction to reinsurance. It provides an overview of the reinsurance market and shows how different types of reinsurance work to spread and mitigate risk for insurers and reinsurers.

PART XIV: OPERATIONS

Basic Margin

This course provides an introduction to margin trading and the mechanics of a margin account. It outlines the basic requirements that govern margin transactions, and teaches the calculations used by broker/dealers in the day-to-day operation of a margin account.

Life of a Trade: U.S. Domestic

This course provides an overview of each step in the life of a trade from the perspective of the broker/dealer at the heart of the process. Organized chronologically, from trade initiation through final settlement, the course highlights the key players, processes, and trends that are relevant to brokerage operations today.

Life of a Trade: Global

This course provides an overview of the life of an international trade including the key players and processes that distinguish global trading from domestic trading. Organized chronologically from trade initiation through final settlement, the course highlights each step in the life of a trade, as well as emerging trends in the global market and techniques to manage risk.

Introduction to Prime Brokerage

Although prime brokerage has been in existence for many years, the tremendous growth in this sector of the capital markets services industry has been driven by the acceleration of the hedge fund industry. This course will take you through the products and services offered by this fast-growing business.

PART XV: MANAGEMENT AND LEADERSHIP

Hiring the Best

This course will teach you how to structure the interview process in order to identify, evaluate, and hire the best candidate for the job. It will take you step-by-step through the hiring process. You'll learn to identify job requirements, measure and rate these skills, and conduct an interview that is legal and that provides you with the most useful information in the shortest amount of time. You'll observe effective and ineffective interview scenarios in which you will identify potential interview pitfalls. Then you'll learn about evaluating and comparing candidates, as well as using reference checks.

Coaching for Success

Coaching for Success provides managers, supervisors, team leads and mentors with the knowledge and skills necessary to assess, plan, and carry out a performance coaching dialogue with an employee or person being mentored. Additionally, this course provides techniques for ongoing performance feedback and skills for recognizing a coaching opportunity. It will encourage students to become involved, on an ongoing basis, with the performance growth of other employees to develop and enhance their skills. At the end of the course, students will participate in a simulated coaching dialogue to practice applying these skills in a typical coaching situation.

Corrective Action

In Corrective Action, students will learn how to facilitate their employees' improvement, instead of merely disciplining them. The course covers when and how to apply corrective action, and provides strategies for motivating employees to improve. Students will learn to use a range of corrective modes in a balanced and objective manner, including applying the progressive disciplinary model, documenting corrective action through a standard documentation template, and counseling employees towards improvement in a professional manner.

Improving Productivity

Improving Productivity introduces you to the main elements of productivity, and provides you with guidelines on how to evaluate and improve productivity in your workplace. In this course you will learn how to consistently and systematically apply a six-step process to resolving productivity problems in your work environment. You begin the process by carefully investigating what events, processes, or procedures led to the problem. Once you have identified the source of the problem you will begin to look for opportunities to improve the end result. You'll also learn that one such opportunity is understanding the value of your work group in this process. The steps you will learn about in Improving Productivity will keep you focused on what needs to be done to resolve problems and enhance current productivity levels.

Managing Change

In Managing Change, you will learn about the typical effects that change events can have on individuals and organizations. It will teach you leadership strategies for approaching change. Through honing your communication skills and applying them to a four-step change communication process, the course will prepare you to better manage the impact of change. You'll learn to identify reactions to change and address them effectively. You'll learn how to gain commitment from others to support change and to take action. Ultimately, Managing Change will give you the skills to become a change leader in your organization.

Managing Employee Relations

Managing Employee Relations is designed to prepare you for the challenges of the contemporary workplace. This course provides you with a four-step strategy for managing employee relations--compliance with legislation, managing diversity, handling work and personal issues, and fostering open communications. After an overview of the importance of employee relations and their impact on the workplace, you then review the legislation that protects employees from discriminatory and unfair practices. You learn what your responsibilities are in such cases and how to respond to the specific problems outlined by the law. You also learn how to identify diversity issues in a team, how to respond to personal issues that affect the work environment, how to promote open communications, and how to establish formal and informal problem resolution processes. From these strategies, you learn effective practices and guidelines for handling workplace situations that threaten positive employee relations.

Performance Management

In Performance Management, students will learn a proactive approach to performance management through a process called the Performance Management Cycle. Managers will learn to set clear expectations with employees, as well as deliver performance feedback and objective evaluations through the three stages of the Performance Management Cycle: Planning, Feedback, and Evaluation.

Rewards and Recognition

Rewards and Recognition explores why recognition - the acknowledgment and appreciation of a person's efforts - and reward - the tangible symbol of that appreciation - are important to job satisfaction and employee retention. The course will teach you the core principles and characteristics of recognition and the benefits that giving rewards and recognition can bring to individual employees, to your department or workgroup, and to the institution. The consequences of neglecting or withholding recognition are noted as well. You will learn how to plan, administer and implement an effective rewards and recognition program that utilizes both non-monetary and small-cost resources. Rewards and Recognition provides you with the knowledge and skills necessary to recognize, reward, and motivate employees toward continued and improved performance.

PART XVI: MBA ESSENTIALS

Accounting Essentials

Accounting teaches financial professionals several different business disciplines simultaneously, including general finance, economics, operations, marketing, and business strategy. Whether your business background is in banking, investments, technology, or consulting, you will need to understand the basic principles of accounting. Focusing primarily on financial accounting (as opposed to tax accounting or managerial accounting), with an emphasis on the investors' perspective, Accounting Essentials will teach you the logic and language behind the practice of accounting. More specifically, this course will teach accounting entries for 11 basic transactions, including start-up, operations, and adjusting entries.

Business Math Boot Camp

Math Boot Camp will give you an overview of the basic math principles you need in the workplace, and demonstrate how mathematics can help you make better decisions.

Calculus Essentials

This course will familiarize the learner with calculus. It starts with the idea of limit and ends with derivative functions. It also includes an application of limit in finance: continuous compounding.

Finance Essentials I

Finance Essentials I will introduce you to the world of corporate finance and help you understand the issues that a company's financial managers face on a daily basis. Utilizing the story of a fictional retailer, N-Style, you will explore the importance of time value of money, short-term financing, and the use of discounted cash flow (DCF) analysis to value a company.

Finance Essentials II

Finance Essentials II will introduce you to the world of corporate finance and help you understand the issues that a company's financial managers face on a daily basis. Utilizing the story of a fictional retailer, N-Style, you will explore the importance of choosing appropriate long-term investments for a company, raising capital to finance those long-term investments, and managing business risk.

Microeconomics Essentials

Microeconomics is based on principles of market performance, industry structure, and company behavior. Those principles derive from essential microeconomics concepts and models, such as demand curves, price elasticity, marginal revenue, and marginal costs. Microeconomics Essentials covers the foundations of business strategy—the primary, high-level issues and decisions that ultimately determine the success and/or failure of the business. Throughout this course, we illustrate microeconomic principles by looking at Pepsi and its rival, Coke.

Statistics Essentials

Business statistics informs business strategy. Professionals rely upon statistics to perform important analyses, improve business practices, analyze historical data, make predictions about the future, and devise strategies for enhancing performance. This course presents the fundamental principles and techniques of statistics, and shows how they are used to make informed business decisions.

PART XVII: PORTFOLIO MANAGEMENT

Hedging Equity with Futures and Options

This course provides an overview of how investors hedge equity with futures and options. It focuses specifically on two types of futures, index and single stock, and four different options strategies: protective puts, bear put spreads, collars, and covered call writing. For each instrument, the overview includes a description of how the hedge is created and an analysis of how the hedge may perform in various market conditions.

Introduction to Portfolio Management

The goal of portfolio management is to create a grouping of assets that achieves a stated or desired return while avoiding undue risk -- an intuitively simple concept that turns out to be remarkably complex to implement. A portfolio manager must not only consider how to allocate a client's resources within a set of potential investments, but how these investments will perform together. This course will teach you how to create a portfolio of assets that have a higher expected return and a lower expected risk than that of any of the individual assets. It will also examine the role of the efficient market in selecting the optimal portfolio.

PART XVIII: RETAIL & SMALL BUSINESS BANKING FUNDAMENTALS

Banking Today

Banking Today introduces new employees to the essential principles, concepts and operations of banking. Students will learn the impact of banking on the economy, as well as the trends, business and environment of commercial banking today. By the end of the course, students will have a "big picture" perspective of the financial services industry and banking.

Fundamentals of Small Business Banking

Fundamentals of Small Business Banking teaches students to build successful relationships with small business clients by gaining knowledge of the small business market. Students will learn the operating and business cycles of small businesses, and will learn to apply their knowledge to meet the financial needs of small business clients.

Consumer Credit Products

Consumer Credit Products provides students with the knowledge and skills necessary to discuss and sell consumer loan products to clients. After defining credit terminology and product features and benefits, the course reviews the two primary consumer loan categories - secured and unsecured - and the various loan products associated with each category. The course also covers the importance of bank regulations for consumer credit products in the lending process. Students learn how to use their product knowledge by matching consumer credit products and services to their client's needs.

Credit Products for Small Businesses

Credit Products for Small Businesses teaches students how to recognize the factors that drive the need for small business credit products, the primary credit products used by small businesses, and how to match credit products to client needs. Students will learn techniques for communicating the credit decision effectively, and the Federal laws relating to small business credit products.

Fundamentals of Consumer Lending

Fundamentals of Consumer Lending covers the basics of consumer credit including terminology, categories of credit, and credit worthiness. Students will learn the application process and the actions required to ensure bank compliance with regulations. By the end of the course, students should have a higher comfort level with consumer credit and feel an increase in credibility when interacting with clients who apply for consumer credit.

Fundamentals of Mortgage Lending

Fundamentals of Mortgage Lending provides students with the knowledge and skills necessary to discuss or sell real estate credit products with clients. The course covers the importance of mortgage lending to financial institutions and the affect of the secondary market on the lending process. It also gives an overview of real estate basics; why a client might want a real estate loan, mortgage terminology, the calculation of loan to value ratios. The loan process is discussed from the client perspective and the functions of the various financial services personnel involved. Regulations that affect the mortgage lending process are introduced at relevant points in the course.

Introduction to Analyzing Financial Statements

Introduction to Analyzing Financial Statements presents students with the tools needed to analyze financial statements with confidence. After reviewing the importance of analyzing financial statements in the small business lending process, students will learn the terms and steps associated with analyzing financial statements, including the income statement, the balance sheet and the cash flow statement. By the end of the course, students will have a better picture of what is required in analyzing financial statements, and know how to explain their interpretations of the financial information.

Introduction to Financial Planning Products

Introduction to Financial Planning Products is designed to teach students about financial planning products and how they can fit into a specific client's financial planning strategy. After a thorough overview of planning products, students will learn three key elements in assessing their advantages and disadvantages: liquidity, risk, and return. Students will also learn to identify licensing requirements relevant to selling certain financial planning products.

Overview of Financial Statements

Overview of Financial Statements introduces students to small business financial statements. This course provides a solid foundation for understanding balance sheets, income statements, cash flow statements and tax return forms, and their typical uses in lending. Students will learn how each statement presents information about a business and contributes to meaningful conclusions about the health and stability of the business.

Personal Tax Return Analysis

Personal Tax Return Analysis is designed to teach students the basics of analyzing tax returns. The course begins with a discussion about analyzing returns to determine a projected income. Students will learn about income trends, recurring versus non-recurring income, and how tax returns can be used as a sales tool. By the end of the course students should be confident in analyzing personal tax returns.

Referring Mutual Funds and Securities Customers

Referring Mutual Funds and Securities Customers teaches students a professional and effective process for referring clients to a licensed securities specialist. After an overview of securities products commonly offered by banks, students will learn how to use a variety of clues to identify a clients' recognized and unrecognized financial needs, and how to gather information that a licensed investment specialist will find helpful as they work with a referred client. Students will also learn how to use the H.E.L.P. tool to make effective and professional referrals.

Referring Trust Customers

Referring Trust Customers teaches students how to identify and refer potential trust clients. The course explores the basic elements of a trust and the five primary reasons why clients want or need a trust. Students will learn trust terminology, common trust products and how they apply to a typical client, and the skills and techniques that support a client-benefit-focused referral approach.

Understanding Financial Planning

Understanding Financial Planning introduces students to the importance of financial planning. Students will gain general knowledge of various financial products, and learn to assess a client's financial needs by evaluating their current financial situation using net worth, rate of savings, and cash flow. Students will also examine how personal factors such as risk tolerance, goals, and time frame, affect a client's investment decisions.

PART XIX: RISK MANAGEMENT

Understanding Uncertainty: An Intuitive Approach to Probability and Statistics

A background in the basic principles of uncertainty is essential to understanding all kinds of risk. This course presents an accessible introduction to the basic principles of statistics through interactive, engaging simulations. The real-life application of the principles is also explored.

Operational Risk Fundamentals

This course is an introduction to operational risk. The course examines the importance of operational risk in today's financial environment. Procedures for identifying, reporting, and managing operational risk are covered in the second part of the course.

Operational Risk: Quantification and Mitigation

This course examines the importance of operational risk in today's financial environment. The course describes operational risk indicators, quantification, and mitigation.

Portfolio Returns

This course defines a portfolio of securities and explains how to track its performance through portfolio returns.

Portfolio Diversification

This course explains the mechanics behind portfolio diversification, particularly how each element of a portfolio affects its overall risk.

Portfolio Risk

Portfolio returns only gain real significance when the amount of risk taken to obtain those returns is considered. This course assesses risk by measuring the way portfolio returns have fluctuated over a holding period.

Probability Distribution of Returns

This course illustrates how past returns can be used to predict future returns.

Value-at-Risk

This course introduces Value-at-risk or VAR, a measure used by financial practitioners to quantify their exposure to loss.

Introduction to Monte Carlo Simulation

This course describes Monte Carlo simulation, a technique that uses random numbers to calculate possible future returns based on past experience.

Monte Carlo Simulation and VAR

This course explains how Monte Carlo simulation is used for computing VAR, particularly for complex portfolios and long holding periods.

PART XX: TRUST AND INVESTMENTS

Building Trust Expertise - Investment Management

In Building Trust Expertise- Investment Management, students will learn trust investment basics. They will enhance their professionalism by increasing their comfort level in discussing a trust investment portfolio with clients and beneficiaries. Students will learn about the investment types commonly used in trusts, the methods for stock and bond selection and analysis, and the economic influences and legal considerations regarding trust investments. Students will also examine the various considerations and tools for portfolio management.

Building Trust Expertise - Taxation and Estate Planning

Building Trust Expertise - Taxation and Estate Planning introduces students to basic fiduciary income tax and estate planning concepts. It begins with tax basics, including terminology and how income tax is calculated. The trust taxation discussion covers the tax implications for grantor and charitable trusts, as well as trust accounting income. Students will also learn about distributable net income (DNI)-what it is and how to calculate it for simple and complex trusts. Students will move on to transfer taxes, including gift, estate, and generation skipping transfer taxes. This covers special rules for these taxes, ways to minimize taxes, and how to calculate the various taxes. Next, students will learn about basic estate planning, including why estate planning is important, things to consider, and advantages and disadvantages of making lifetime gifts. Finally, students will learn about estate planning with the marital deduction.

Building Trust Expertise - Trust Administration

Building Trust Expertise: Trust Administration provides an overview of trust administration for personal trusts, and teaches students to use common trust terminology appropriately. Students will learn trust basics, including terminology and concepts, and gain an understanding of why clients benefit from trusts, as well as common types of personal trusts. The course also covers account acceptance and termination, and discretionary distributions.

APPENDIX A: FOREIGN LANGUAGE

Courses Also Available in Japanese

Catalogue descriptions in Japanese are available upon request.
