BBVA
Banca Privada UHN

Requirements
Wealth Management Program

Delegates: Associate's, Undergraduates and Graduate degree students with varying fundamental financial product knowledge interested in developing a proficient understanding in wealth and asset management.

Required age: 21+

Suggested age: 21 - 27

Delivery: Instructor led live classroom training at NYIF.

Our Approach

Measurable Outcomes

The New York Institute of Finance **(NYIF)** has develop a customized training program drawing on our library of online and in-person training material to meet clearly specified, measurable training outcomes.

The Learning Experience

Prior to the commencement of training, delegates will be granted access to a dedicated program portal hosted on our online training platform, **https://learning.nyif.com**. Delegates will be able to review course material before the training starts. A forum on the portal will grant delegates access to our instructor and facilitate peer group discussion to enhance learning. Delegates will retain access to the portal for a period of **3 months** following the conclusion of training.

Schedule

	SUNDAY June 28th	MONDAY June 29th	TUESDAY June 30th	WEDNESDAY July 1st	THURSDAY July 2nd	FRIDAY July 3rd
7:30 am		Meeting Point at Hotel Lobby	Meeting Point at Hotel Lobby	Breakfast/Meeting Point at Hotel Lobby	Meeting Point at Hotel Lobby	Meeting Point at Hotel Lobby
8:00 am		Breakfast at NYIF	Breakfast at NYIF	Company Visits: New York Stock Exchange Opening Bell	Breakfast at NYIF	Breakfast at NYIF
9:00 am		Sessions start: Capital Markets: Evolution Through Crisis	Sessions start: Fixed Income Analysis Distinguishing features of derivation & overview of equities		Sessions start: Alternative Investment	Sessions start: Alternative Investment
10:00 am				JP Morgan Visit		
12:00 pm		Lunch: CUT	Lunch: Manhatta	Bloomberg	Lunch: Cipriani	Lunch: Nobu
02:00 pm		Back to sessions	Back to sessions	Lunch: TBC	Back to sessions	Back to sessions
03:00 pm	Hotel check in					
04:30 pm		Sessions end	Sessions end	World Trade Center	Sessions end	Sessions end
06:00 pm				Sessions end		
08:00 pm	Welcome meeting at Hotel					Closure Dinner

Program

The program will comprise 5 days of in-person, classroom training and site visits.

Wealth Management Training Program

Day 1: Capital Markets: Evolution Through Crisis

Key Players and Historical Background

- How we got to where we are: Revocation of the Glass Steagall Act.
- Regulatory environment: Role of the SEC, and self-regulation organizations, and the Federal Reserve Bank.
- Participants in the marketplace and their role (investment bankers, economists, traders, portfolio managers, hedge fund managers, brokers).
- Equity Securities.
- Fixed Income Securities.
- Derivatives Instruments.
- Alternative Investments.
- Portfolio Management.

Understanding the IPO process (and new DPO process) how to buy IPOs

- Understanding how stocks trade on an exchange (role of the specialist).
- How stocks trade OTC (role of NASDAQ).
- Types of equity securities.
- ETFs explosive growth of this asset category, and its contribution to commodity volatility (how and why to trade gold, oil, indices as a security).

Day 2: Fixed Income Analysis, Distinguishing Features of Derivative& Overview of Equities

Fixed Income

- Understanding treasury securities and their role in financing out government deficit.
- Corporate bonds: Understanding credit spreads, the appeal of bonds to investors and the associated risks, role of the rating agencies will be emphasized.
- Mortgage backed bonds how they work. From high quality bonds to subprime.
- The MBS marketplace, how mortgage companies operate and various structures of bonds.
- The role of government agencies such as GNMA, FNBA and FHLB will be reviewed.

Derivatives

- Defining and understanding the role of derivatives (options, futures, forwards and swaps).
- Use of derivatives in hedging risk or speculation.
- Review of credit default swaps (CDS) and their role in the current crisis.
- Understanding CDOs, (bonds based on swaps) and their role in the crisis.

Equity Security

- Market participants: Issuers and Investors.
- Brokerage Firms, Institutions, Banks.
- Industry Utilities and Service Organizations.
- Exchange Structure.
- How did we get here.
- Listed (displayed) Markets.
- NYSE Floor Brokers and Specialists.
- Exchange business model.
- Market Making and Montage.
- Return on Investment, Return on assets (ROA), Return on equity (ROE).

Day 3: Company Visits

8:00 - 10:00 am
Stop # 1: New York Stock Exchange Opening Bell

10:00 am - 11:00 am
Stop # 2: Company visit: JP Morgan

12:00 - 1:00 pm
Stop # 3: Bloomberg Office

2:00 - 3:00 pm
Stop # 4: Lunch

4:30 - 6:00 pm
Stop # 5: World Trade Center

Day 4 & 5: Alternative Investment

Hedge Funds

- Definition of a hedge fund.
- Why we invest in Hedge funds.
- Common hedge fund traits, styles and strategies.
- International issues and opportunities.

Private Equity Investments

- Industry Background.
- Portfolio Theory.
- Asset Allocation with Private Equity.
- Venture Capital and Valuation.
- Comparisons of Private Equity to Hedge Funds.
- Private Equity Evaluations.
- How investors make a return.
- Walk through an actual Valuation Statement.

Real Estate

- Real estate structures.
- Role in portfolio diversification.
- Rent versus own.
- Direct investment compared to quasi-real estate companies.
- Hidden real estate issues.
- Financially engineering in real estate.
- Evaluation of risk/reward results.

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Creando Oportunidades