



ACCOUNTING AND FINANCE

Advanced Investment Training

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Advanced Investment Training

Description:

This course aims to provide finance staff with a deeper understanding of fund management and the wider investment classes so they can confidently take responsibility for investments. The course textbook is the Sarasin & Partners Compendium of Investment, which is used as a reference document across the sector.

Who should attend?

The course is open to charities only, and is suitable for anyone in the finance function responsible for investments, as well as charity trustees and CEOs. This is a good follow on from the Foundation Investment Training course and will allow attendees to further their understanding of investment issues.

Course Content

- Investment Objectives defining your investment goals
- Considerations to be taken when investing in commercial property, hedge funds, bonds and derivatives for Efficient Portfolio Management (EPM)
- Manager risk versus market risk
- Active versus passive
- Projecting returns and maintaining a portfolio's real value
- Investment strategies real examples
- Volatility and income the 3rd great dilemma
- Social impact investment opportunity or chimaera
- Checklist of things to consider before investing charitable funds

