

Postgraduate Diploma Financial Advisory and Planning



Postgraduate Diploma Financial Advisory and Planning

- » Modality: online
- » Duration: 6 months
- » Certificate: TECH Global University
- » Credits: 18 ECTS
- » Schedule: at your own pace
- » Exams: online

Website: www.techtute.com/us/school-of-business/postgraduate-diploma/postgraduate-diploma-financial-advisory-planning

Index

01

Welcome

p. 4

02

Why Study at TECH?

p. 6

03

Why Our Program?

p. 10

04

Objectives

p. 14

05

Structure and Content

p. 18

06

Methodology

p. 24

07

Our Students' Profiles

p. 32

08

Course Management

p. 36

09

Impact on Your Career

p. 40

10

Benefits for Your Company

p. 44

11

Certificate

p. 48

01 Welcome

In environments that are as constantly changing as those of financing and financial asset management, it is of vital importance to be adapted to the new demands of the market, as well as to have the necessary strategies and keys to invest successfully. Generally, this kind of knowledge is scattered or difficult to access, so this university program compiles the most current approaches to portfolio management and financial planning, as well as the fundamentals of investment that are essential to lay the most cutting-edge theoretical foundations. All this, in a convenient and flexible format, as it is 100% online and does not require attending classes or following pre-set schedules.



Postgraduate Diploma in Financial Advisory and Planning.
TECH Global University



“

Lead advisory and financial planning projects, knowing the professional keys of renowned advisors in the sector”

02

Why Study at TECH?

TECH is the world's largest 100% online business school. It is an elite business school, with a model based on the highest academic standards. A world-class centre for intensive managerial skills training.



“

TECH is a university at the forefront of technology, and puts all its resources at the student's disposal to help them achieve entrepreneurial success"

At TECH Global University



Innovation

The university offers an online learning model that combines the latest educational technology with the most rigorous teaching methods. A unique method with the highest international recognition that will provide students with the keys to develop in a rapidly-evolving world, where innovation must be every entrepreneur's focus.

"Microsoft Europe Success Story", for integrating the innovative, interactive multi-video system.



The Highest Standards

Admissions criteria at TECH are not economic. Students don't need to make a large investment to study at this university. However, in order to obtain a qualification from TECH, the student's intelligence and ability will be tested to their limits. The institution's academic standards are exceptionally high...

95% | of TECH students successfully complete their studies



Networking

Professionals from countries all over the world attend TECH, allowing students to establish a large network of contacts that may prove useful to them in the future.

100,000+

executives trained each year

200+

different nationalities



Empowerment

Students will grow hand in hand with the best companies and highly regarded and influential professionals. TECH has developed strategic partnerships and a valuable network of contacts with major economic players in 7 continents.

500+

collaborative agreements with leading companies



Talent

This program is a unique initiative to allow students to showcase their talent in the business world. An opportunity that will allow them to voice their concerns and share their business vision.

After completing this program, TECH helps students show the world their talent.



Multicultural Context

While studying at TECH, students will enjoy a unique experience. Study in a multicultural context. In a program with a global vision, through which students can learn about the operating methods in different parts of the world, and gather the latest information that best adapts to their business idea.

TECH students represent more than 200 different nationalities.



TECH strives for excellence and, to this end, boasts a series of characteristics that make this university unique:



Analysis

TECH explores the student's critical side, their ability to question things, their problem-solving skills, as well as their interpersonal skills.



Academic Excellence

TECH offers students the best online learning methodology. The university combines the Relearning methodology (the most internationally recognized postgraduate learning methodology) with Harvard Business School case studies. A complex balance of traditional and state-of-the-art methods, within the most demanding academic framework.



Economy of Scale

TECH is the world's largest online university. It currently boasts a portfolio of more than 10,000 university postgraduate programs. And in today's new economy, **volume + technology = a groundbreaking price**. This way, TECH ensures that studying is not as expensive for students as it would be at another university.



Learn with the best

In the classroom, TECH's teaching staff discuss how they have achieved success in their companies, working in a real, lively, and dynamic context. Teachers who are fully committed to offering a quality specialization that will allow students to advance in their career and stand out in the business world.

Teachers representing 20 different nationalities.



At TECH you will have access to Harvard Business School case studies"

03

Why Our Program?

Studying this TECH program means increasing the chances of achieving professional success in senior business management.

It is a challenge that demands effort and dedication, but it opens the door to a promising future. Students will learn from the best teaching staff and with the most flexible and innovative educational methodology.



“

We have highly qualified teachers and the most complete syllabus on the market, which allows us to offer you training of the highest academic level"

This program will provide students with a multitude of professional and personal advantages, particularly the following:

01

A significant career boost

By studying at TECH, students will be able to take control of their future and develop their full potential. By completing this program, students will acquire the skills required to make a positive change in their career in a short period of time.

70% of participants achieve positive career development in less than 2 years.

02

Develop a strategic and global vision of companies

TECH offers an in-depth overview of general management to understand how each decision affects each of the company's different functional areas.

Our global vision of companies will improve your strategic vision.

03

Consolidate the student's senior management skills

Studying at TECH means opening the doors to a wide range of professional opportunities for students to position themselves as senior executives, with a broad vision of the international environment.

You will work on more than 100 real senior management cases.

04

Take on new responsibilities

The program will cover the latest trends, advances and strategies, so that students can carry out their professional work in a changing environment.

45% of graduates are promoted internally.

05

Access to a powerful network of contacts

TECH connects its students to maximize opportunities. Students with the same concerns and desire to grow. Therefore, partnerships, customers or suppliers can be shared.

You will find a network of contacts that will be instrumental for professional development.

06

Thoroughly develop business projects

Students will acquire a deep strategic vision that will help them develop their own project, taking into account the different areas in companies.

20% of our students develop their own business idea.

07

Improve soft skills and management skills

TECH helps students apply and develop the knowledge they have acquired, while improving their interpersonal skills in order to become leaders who make a difference.

Improve your communication and leadership skills and enhance your career.

08

Be part of an exclusive community

Students will be part of a community of elite executives, large companies, renowned institutions, and qualified professors from the most prestigious universities in the world: the TECH Global University community.

We give you the opportunity to train with a team of world renowned teachers.

04

Objectives

Delving into financial income, interest rates or tax planning requires the greatest possible precision and updating, since the financial manager must be prepared for the constant changes in the economic market. This Postgraduate Diploma offers a series of fundamental competencies, adapted to the current reality, so that the graduate starts from a privileged position when it comes to improving his or her salary and professional expectations.



“

Enhance your management skills, excelling prominently in client profile analysis, portfolio diversification and financial planning strategies”

TECH makes the goals of their students their own goals too.
Working together to achieve them.

The Postgraduate Diploma in Financial Advisory and Planning prepares the student to:

01

Obtain the mathematical-financial knowledge necessary to analyze investment alternatives

04

Acquire the necessary skills to find the required sources of information and filter the data to be analyzed

02

Obtain the necessary skills to analyze multiple variables for result realization

05

Know how to identify the advantages and risks of all investment alternative

03

Understand the functioning of all financial assets traded in the SFE

06

Learn to identify and understand a client's risk profile in order to be able to identify the investment alternatives that suit the client

07

Understand the psychology applied to investment

10

Know the current financial market trends

08

Obtain the necessary skills to manage a third party investment Wallet

11

Obtain global analysis skills that allow students to deal with different financial-fiscal variables

09

Obtain extensive knowledge of the tax implications of different investment alternatives

12

Integrate all knowledge to prepare a financial and tax proposal/planning for the client based on their objectives and risk assumption

05

Structure and Content

With a special care in taking advantage of the maximum efficiency and profitability for the student of all the contents covered, TECH has used the pedagogical methodology of Relearning for the development of the teaching materials. This means that the most important concepts of Financial Advisory and Planning are progressively repeated throughout the study plan, which results in the student naturally grasping them, and as a result saving numerous hours of study time.



“

Enroll today and don't miss the opportunity to be part of the world's largest online academic institution”

Syllabus

The most demanding financial reality requires leaders adapted to the new economic paradigms, with an updated set of tools and enhanced skills in Financial Advisory and Planning.

With instruction focused not only on financial techniques and methodology, but also on the development of transversal competencies and distinctive leadership, professionals will find this comprehensive and appealing program. This qualification goes beyond the basic necessary and essential skills in today's labor market, making a firm commitment to present and future financial advisors.

For this, a multitude of practical cases and simulated scenarios are presented, in which students will develop their managerial and organizational skills to put themselves at the forefront of financial leadership.

A curriculum that covers the knowledge, both theoretical and practical, required of any professional interested in leading a growing sector. This is a unique opportunity to distinctively enhance the managerial and organizational capabilities of distinctive and modern leaders. By understanding the financial market needs and specializing in exceeding them, students will be taking a firm step towards a much more prosperous and prestigious economic future.

This Postgraduate Diploma takes place over 6 months and is divided into 3 modules:

Module 1. Investment Fundamentals

Module 2. Portfolio Management

Module 3. Financial Planning



Where, When and How is it Taught?

TECH offers the possibility to study this Postgraduate Diploma in Financial Advisory and Planning completely online. Throughout the 6 months of the educational program, you will be able to access all the contents of this program at any time, allowing you to self-manage your study time.

Relates advertising and public relations in a coherent manner with other social and human sciences.

Module 1. Investment Fundamentals

1.1. Temporal Value of Money

- 1.1.1. Financial Capital
- 1.1.2. Financial Equivalence
- 1.1.3. Operation and Financial Law

1.2. Capitalization

- 1.2.1. Simple
- 1.2.2. Compounds
- 1.2.3. Use of Calculators for Calculations

1.3. Update

- 1.3.1. Simple
- 1.3.2. Compounds
- 1.3.3. Use of Calculators for Calculations

1.4. Commercial Discount

- 1.4.1. Simple
- 1.4.2. Compounds
- 1.4.3. Use of Calculators for Calculations

1.5. Interest Rates

- 1.5.1. Spot
- 1.5.2. Forward
- 1.5.3. How to calculate Forward Interest Rates ?

1.6. Types of Return I

- 1.6.1. Nominal and Real
- 1.6.2. Simple Return
- 1.6.3. Annual Percentage Rate (APR)

1.7. Types of Return II

- 1.7.1. Internal Return Rate (IRR)
- 1.7.2. Effective Return Rate (ERR)
- 1.7.3. Geometric Return Rate (GRR)

1.8. Financial Income

- 1.8.1. Concept and Classification of Different Income Types
- 1.8.2. Proportionality and Income Addition
- 1.8.3. Certain and Constant Income Valuation

1.9. Basic Concepts of Statistics

- 1.9.1. Qualitative and Quantitative Variables:
- 1.9.2. Position Measurements
- 1.9.3. Measures of Dispersion

1.10. Two-Dimensional Variables

- 1.10.1. Covariance
- 1.10.2. Coefficient Correlation
- 1.10.3. Regression Line

Module 2. Portfolio Management

2.1. Client Profile Analysis

- 2.1.1. Investment Objective
- 2.1.2. Investment Returns and Client Risk
- 2.1.3. Horizon

2.2. Contracts and Regulations

- 2.2.1. MiFID 2
- 2.2.2. Suitability Test
- 2.2.3. At Risk Profiles

2.3. Wallet Management Introduction

- 2.3.1. Market Efficiencies
- 2.3.2. Market Failures
- 2.3.3. Active Management vs Passive Management

2.4. Return and Risk

- 2.4.1. Of an Asset
- 2.4.2. Of the Wallet
- 2.4.3. Normality Hypothesis

2.5. Diversification

- 2.5.1. Types of Risk
- 2.5.2. Correlation
- 2.5.3. Beta

2.6. Wallet Theory

- 2.6.1. Efficient Wallet
- 2.6.2. CML
- 2.6.3. SML

2.7. Measurement Ratios I

- 2.7.1. Sharpe Ratio
- 2.7.2. Treynor Ratio
- 2.7.3. Jensen Alpha

2.8. Measurement Ratios II

- 2.8.1. Tracking Error
- 2.8.2. Information Ratio
- 2.8.3. Consistency

2.9. Excel for Wallet Management

- 2.9.1. Data Sources
- 2.9.2. Sheet Programming
- 2.9.3. Interpretation of Results

2.10. New Investment Criteria in Wallet Management

- 2.10.1. ESG
- 2.10.2. Alpha Portable
- 2.10.3. MFI

Module 3. Financial Planning**3.1. Financial Advice**

- 3.1.1. Individual Advice
- 3.1.2. Dependent Advice
- 3.1.3. Portfolio Management

3.2. Basic Principles for Retirement Planning

- 3.2.1. How Long Do I Have to Quote?
- 3.2.2. How to Calculate My Pension?
- 3.2.3. What Pension Am I Entitled to??

3.3. Retirement Income and Expense Analysis

- 3.3.1. Difference in Income upon Retirement
- 3.3.2. Expense Structure (Fixed and Variable) vs. Retirement Income
- 3.3.3. Where to Get Extra Income in Retirement
Advantages and Disadvantages of Bailouts?

3.4. Capital Accumulation Plan

- 3.4.1. Weighted Average Price
- 3.4.2. Investment Strategy
- 3.4.3. Technical Development

3.5. Life Cycle

- 3.5.1. Formation and Accumulation Phase
- 3.5.2. Consolidation Phase
- 3.5.3. Expenditure and Donation Phase

3.6. Fund Analysis and Selection

- 3.6.1. At Risk Profiles
- 3.6.2. Ratios to Be Checked
- 3.6.3. Spending Study Historical Results

3.7. Pension Plan Tax Planning

- 3.7.1. Taxation
- 3.7.2. Rescue
- 3.7.3. Rebates

3.8. Inheritance Planning

- 3.8.1. Types of Assets I Can Own
- 3.8.2. Tax Implications of Such Assets
- 3.8.3. Inheritance Structure to Minimize Tax Impact

3.9. Investment Psychology

- 3.9.1. Relevant Aspects
- 3.9.2. Biases
- 3.9.3. Customer Psychology Management

3.10. Financial Planning Strategies

- 3.10.1. Mainly Real Estate Assets
- 3.10.2. Mainly Movable Assets
- 3.10.3. Asset Distribution Between Real Estate and Movable Assets

06

Methodology

This academic program offers students a different way of learning. Our methodology uses a cyclical learning approach: **Relearning**.

This teaching system is used, for example, in the most prestigious medical schools in the world, and major publications such as the **New England Journal of Medicine** have considered it to be one of the most effective.





“

Discover Relearning, a system that abandons conventional linear learning, to take you through cyclical teaching systems: a way of learning that has proven to be extremely effective, especially in subjects that require memorization"

TECH Business School uses the Case Study to contextualize all content

Our program offers a revolutionary approach to developing skills and knowledge. Our goal is to strengthen skills in a changing, competitive, and highly demanding environment.

“

At TECH, you will experience a learning methodology that is shaking the foundations of traditional universities around the world”



This program prepares you to face business challenges in uncertain environments and achieve business success.



A learning method that is different and innovative

This TECH program is an intensive educational program, created from scratch to present executives with challenges and business decisions at the highest level, whether at the national or international level. This methodology promotes personal and professional growth, representing a significant step towards success. The case method, a technique that lays the foundation for this content, ensures that the most current economic, social and business reality is taken into account.

“

You will learn, through collaborative activities and real cases, how to solve complex situations in real business environments”

The case method has been the most widely used learning system among the world's leading business schools for as long as they have existed. The case method was developed in 1912 so that law students would not only learn the law based on theoretical content. It consisted of presenting students with real-life, complex situations for them to make informed decisions and value judgments on how to resolve them. In 1924, Harvard adopted it as a standard teaching method.

What should a professional do in a given situation? This is the question we face in the case method, an action-oriented learning method. Throughout the program, the studies will be presented with multiple real cases. They must integrate all their knowledge, research, argue and defend their ideas and decisions.

Our program prepares you to face new challenges in uncertain environments and achieve success in your career.

Relearning Methodology

TECH effectively combines the Case Study methodology with a 100% online learning system based on repetition, which combines different teaching elements in each lesson.

We enhance the Case Study with the best 100% online teaching method: Relearning.

Our online system will allow you to organize your time and learning pace, adapting it to your schedule. You will be able to access the contents from any device with an internet connection.

At TECH you will learn using a cutting-edge methodology designed to train the executives of the future. This method, at the forefront of international teaching, is called Relearning.

Our online business school is the only one in the world licensed to incorporate this successful method. In 2019, we managed to improve our students' overall satisfaction levels (teaching quality, quality of materials, course structure, objectives...) based on the best online university indicators.



In our program, learning is not a linear process, but rather a spiral (learn, unlearn, forget, and re-learn). Therefore, we combine each of these elements concentrically.

With this methodology we have trained more than 650,000 university graduates with unprecedented success in fields as diverse as biochemistry, genetics, surgery, international law, management skills, sports science, philosophy, law, engineering, journalism, history, markets, and financial instruments. All this in a highly demanding environment, where the students have a strong socio-economic profile and an average age of 43.5 years.

Relearning will allow you to learn with less effort and better performance, involving you more in your specialization, developing a critical mindset, defending arguments, and contrasting opinions: a direct equation to success.

From the latest scientific evidence in the field of neuroscience, not only do we know how to organize information, ideas, images and memories, but we know that the place and context where we have learned something is fundamental for us to be able to remember it and store it in the hippocampus, to retain it in our long-term memory.

In this way, and in what is called neurocognitive context-dependent e-learning, the different elements in our program are connected to the context where the individual carries out their professional activity.



This program offers the best educational material, prepared with professionals in mind:



Study Material

All teaching material is produced by the specialists who teach the course, specifically for the course, so that the teaching content is highly specific and precise.

These contents are then applied to the audiovisual format, to create the TECH online working method. All this, with the latest techniques that offer high quality pieces in each and every one of the materials that are made available to the student.



Classes

There is scientific evidence suggesting that observing third-party experts can be useful.

Learning from an Expert strengthens knowledge and memory, and generates confidence in future difficult decisions.



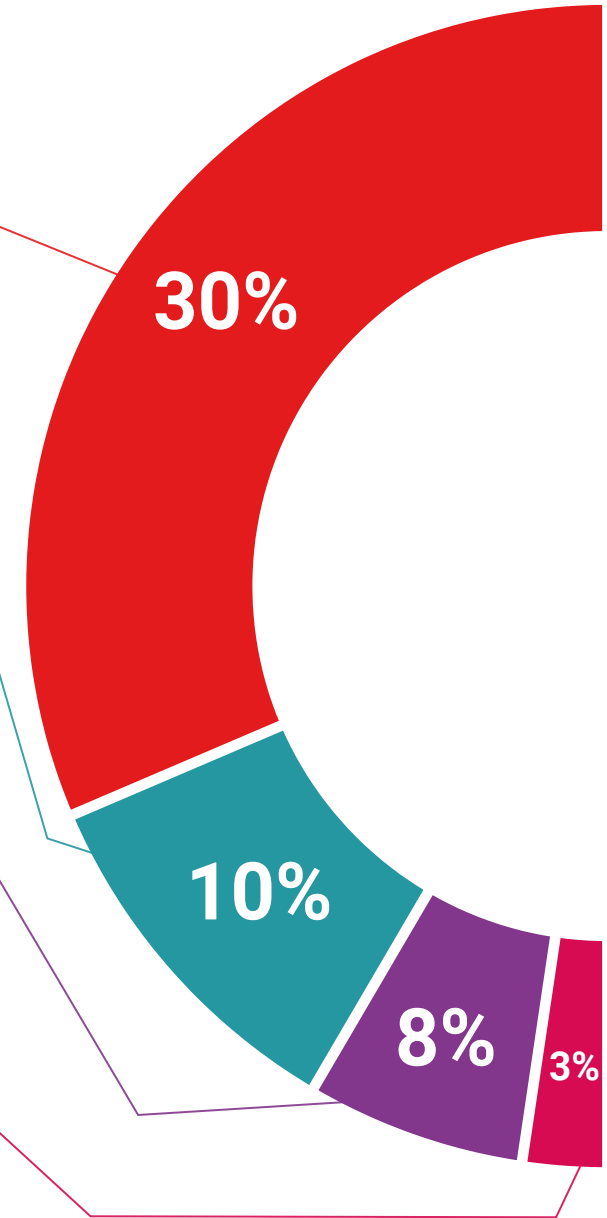
Management Skills Exercises

They will carry out activities to develop specific executive competencies in each thematic area. Practices and dynamics to acquire and develop the skills and abilities that a high-level manager needs to develop in the context of the globalization we live in.



Additional Reading

Recent articles, consensus documents and international guidelines, among others. In TECH's virtual library, students will have access to everything they need to complete their course.





Case Studies

Students will complete a selection of the best case studies chosen specifically for this program. Cases that are presented, analyzed, and supervised by the best senior management specialists in the world.



Interactive Summaries

The TECH team presents the contents attractively and dynamically in multimedia lessons that include audio, videos, images, diagrams, and concept maps in order to reinforce knowledge.

This exclusive educational system for presenting multimedia content was awarded by Microsoft as a "European Success Story".



Testing & Retesting

We periodically evaluate and re-evaluate students' knowledge throughout the program, through assessment and self-assessment activities and exercises, so that they can see how they are achieving their goals.



07

Our Students' Profiles

The variety of professional profiles attracted by this Postgraduate Diploma in Financial Advisory and Planning is an excellent opportunity to build powerful networks. Students will meet not only managers and professionals from the world of finance, but also entrepreneurs and people with whom to share ambitions and goals. Therefore, the program is also a place to meet potential business partners, customers or suppliers.





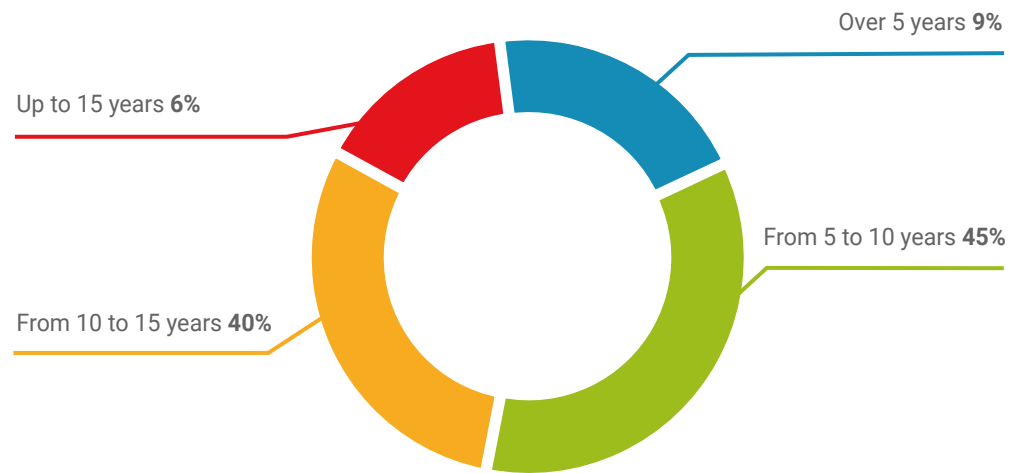
“

You will be in the company of people who share your interests and goals, making the educational experience more enriching”

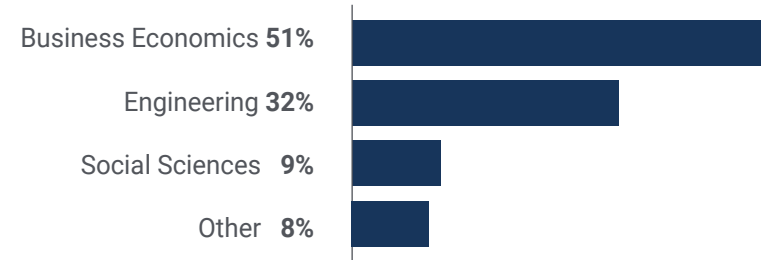
Average Age

Between **35** and **45** years old

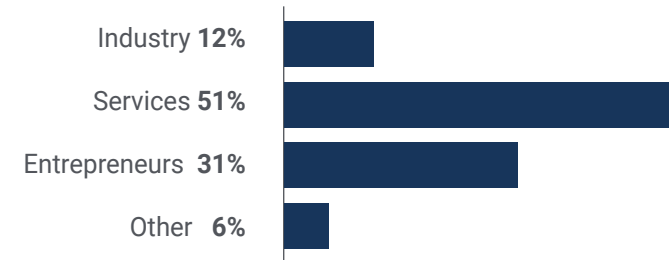
Years of Experience



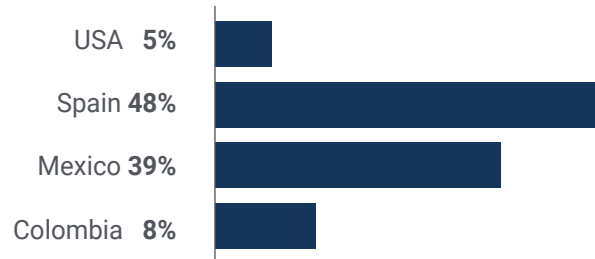
Training



Academic Profile



Geographical Distribution



Edgar Ant3n Quesada

Financial Controller

"I urgently needed a refresher in my approach to financial strategies and planning, as I felt I could not adapt as well as before to the pace of the market. In this Postgraduate Diploma, I found the keys that helped me to continue maintaining my high professional success, which I undoubtedly owe to the professionalism of all the teachers"

08

Course Management

To ensure the highest quality in theoretical and practical content, TECH has put together a teaching team with vast experience in the field of Financial Advisory and Planning. Such experience not only enriches all the theoretical content, but also allows the inclusion of numerous simulated cases and videos in detail for each topic covered. This provides a better contextualization of the entire study plan, with various multimedia resources to further expand the knowledge throughout the program.





“

You will have the customized tutoring of a teaching team committed to you”

Management



Mr. Olivares Pont, Manuel

- ♦ Wealth Manager at GPM
- ♦ Wealth Manager at Andbank Spain
- ♦ Wealth Manager at Esfera Capital AV
- ♦ Wealth Manager at Q-Renta AV
- ♦ Managing Partner of ARBD Consulting
- ♦ Personal Banking Consultant and Financial Advisor at Banco Mediolanum
- ♦ Consultant of EFA Certification and Financial Instruments for Commercial Networks at ISEFI, SANFI and Praxis MMT
- ♦ Degree in Business Administration from Universidad Complutense de Madrid

Professors

Mr. García Bahillo, Luis Miguel

- ♦ Investment Manager at GPRA Capital
- ♦ Wealth Manager at GPM SV
- ♦ Lecturer of Courses related to Financial Advisory
- ♦ Graduate in Economics from the Complutense University of Madrid



09

Impact on Your Career

TECH seeks the greatest positive impact on students' professional career path. Therefore, not only are you provided with the most up-to-date knowledge in Financial Advisory and Planning, but also all this theory is complemented with the most important competencies that a 21st century leader in the finance sector should have. As a result, the graduate will be able to position themselves as a key manager in Financial Advisory and Planning at the highest level.





“

Stand out in your field by including this Postgraduate Diploma in Financial Advisory and Planning in your CV”

Are you ready to take the leap? Excellent professional development awaits you

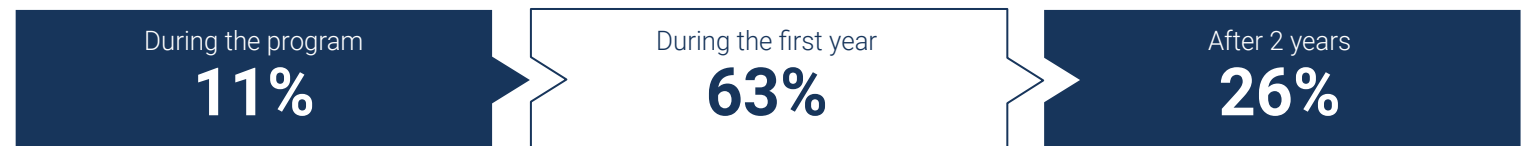
TECH's Postgraduate Diploma in Financial Advisory and Planning is an intensive program that prepares students to face challenges and decisions in the field Financial Advisory. Its primary objective is to promote personal and professional growth,, you achieve success.

If you want to improve, make a positive change at a professional level and network with the best, then this is the place for you.

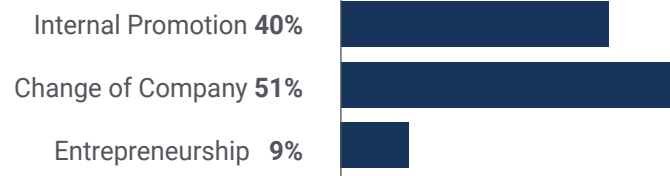
Learn the keys to professional success that will lead you to the management position you aspire to.

You will continue climbing the ladder in the world of financial consulting thanks to this Postgraduate Diploma.

When the change occurs



Type of change



Salary increase

This program represents a salary increase of more than **25.22%** for our students



10

Benefits for Your Company

By receiving instruction not only on a theoretical level, but also through practical exercises and simulated scenarios, the graduate of this degree is prepared to immediately incorporate all their knowledge into their daily practice. This implies that companies will also benefit, as their management and financial planning capabilities will be greatly enhanced by attracting skilled managers with this qualification.





“

Reach the zenith of your career by demonstrating that you are a financial manager with enhanced planning and execution skills”

Developing and retaining talent in companies is the best long-term investment.

01

Intellectual Capital and Talent Growth

The professional will introduce the company to new concepts, strategies, and perspectives that can bring about significant changes in the organization.

02

Retaining high-potential executives to avoid talent drain

This program strengthens the link between the company and the professional and opens new avenues for professional growth within the company.

03

Building agents of change

You will be able to make decisions in times of uncertainty and crisis, helping the organization overcome obstacles.

04

Increased international expansion possibilities

Thanks to this program, the company will come into contact with the main markets in the world economy.



05

Project Development

The professional can work on a real project or develop new projects in the field of R&D or Business Development of your company.

06

Increased competitiveness

This Postgraduate Diploma will equip your professionals with the skills to take on new challenges and therefore drive the organization forward.

11

Certificate

The Postgraduate Diploma in Financial Advisory and Planning guarantees students, in addition to the most rigorous and up-to-date education, access to a Postgraduate Diploma issued by TECH Global University.



“

Successfully complete this program and receive your university qualification without having to travel or fill out laborious paperwork"

This program will allow you to obtain your **Postgraduate Diploma in Financial Advisory and Planning** endorsed by **TECH Global University**, the world's largest online university.

TECH Global University is an official European University publicly recognized by the Government of Andorra ([official bulletin](#)). Andorra is part of the European Higher Education Area (EHEA) since 2003. The EHEA is an initiative promoted by the European Union that aims to organize the international training framework and harmonize the higher education systems of the member countries of this space. The project promotes common values, the implementation of collaborative tools and strengthening its quality assurance mechanisms to enhance collaboration and mobility among students, researchers and academics.

This **TECH Global University** title is a European program of continuing education and professional updating that guarantees the acquisition of competencies in its area of knowledge, providing a high curricular value to the student who completes the program.

Title: **Postgraduate Diploma in Financial Advisory and Planning**

Modality: **online**

Duration: **6 months**

Accreditation: **18 ECTS**





Postgraduate Diploma Financial Advisory and Planning

- » Modality: **online**
- » Duration: **6 months**
- » Certificate: **TECH Global University**
- » Credits: **18 ECTS**
- » Schedule: **at your own pace**
- » Exams: **online**

Postgraduate Diploma Financial Advisory and Planning