




# BE AN INVESTMENT ADVISER

**NISM Series X-A: Investment Adviser Level 1**  
**NISM Series X-B: Investment Adviser Level 2**

Avail classrom learning from the best education provider in the Financial Services industry

Next Batch Starts on: **April 27<sup>th</sup>, 2019** • Last date for registration: **April 15<sup>th</sup>, 2019**

**Limited seats available!**

For Details:  +91 93495 12345  info@schoolofhedge.com  www.schoolofhedge.com

## WHO OFFERS INVESTMENT ADVISER CERTIFICATION?

The certification is offered by National Institute of Securities Markets (NISM), the educational arm of the Securities Exchange Board of India (SEBI). The certification aims to enhance the quality of investment advisory and related services in the financial services industry. Participants learn answers to the What, How, and Why of all investment related products available in India like Stock Market Investments, Mutual Fund Investments, Bonds, Insurance, Fixed Deposits and all other segments one can consider for investing.

## WHY PURSUE AN INVESTMENT ADVISER CERTIFICATION?

- SEBI approved Investment Adviser Certification widely preferred by organizations in the BFSI Industry.
- Mark of excellence in the field of financial planning and investment advisory services.
- Develop skills & competencies to provide holistic investment advisory solutions to clients.
- Gain comprehensive understanding of Investment advisory basics and implementation of financial plans.

## CERTIFICANTS ARE IN DEMAND IN THE FOLLOWING FIELDS:

- Banking • Wealth Management & Investment Advisory Companies
- Asset Management Companies • Financial Planning Services
- Life & General Insurance • Comprehensive Advisory Business
- Stock Broking & Financial Services Companies





## AREAS OF LEARNING

- Basics of investment advisory, steps in the advisory process, and preparing / implementing a financial plan.
- Financial planning as an approach to investing, insurance, retirement planning and as an aid for advisers to develop long term relationships with clients.
- Evaluation of different investments products and aspects of product selection, portfolio construction, review and rebalancing based on client needs.
- Structure and performance of securities markets, importance of asset allocation and impact of market movements on portfolio performance.
- Compliance, operations and service elements in investment advice.
- Income tax, Wealth tax and legalities of Estate planning in personal finance, & regulatory aspects underlying advisory.

## YOUR PATHWAY TO INVESTMENT ADVISER CERTIFICATION

- Meet the education criteria prescribed by NISM
- Pass the required two exams below:

NISM Series X-A : Investment Adviser Level 1

NISM Series X-B : Investment Adviser Level 2

## WHO SHOULD PURSUE AN INVESTMENT ADVISER CERTIFICATION?

- Suitable for all those who wish to acquire skills or pursue a career as an Investment Adviser and Financial Planner.
- Students undergoing their undergraduate or post-graduation courses.
- Professionals from Banks, Mutual Fund Houses, Wealth Management, Family Offices, Advisory Firms, etc.
- Relationship Managers and Dealers in stock broking firms who wish to acquire a SEBI recognized Certification.
- Independent Financial Advisors who manage HNI clients and wish to enhance their knowledge and competencies.

## THE HEDGE SCHOOL ADVANTAGE

- All our faculty are Certified Financial Planners<sup>CM</sup> & Chartered Wealth Managers<sup>®</sup> with rich industry experience.
- Extensive coverage of study material through class room training.
- Interactive sessions and enhanced learning aided by mock tests & case-studies.
- Opportunity to participate in job-based Internship programmes (as needed).

“ *This Course really gives you a practical exposure of Real Wealth Management, helpful for planning your finances & your profession* ”  
Anooj.KG  
AVP, Hedge WMS

### “TESTIMONIALS”

“ *Excellent course in terms of its comprehensiveness. A must for one and all in this domain!* ”  
Babin Faina  
Sr. Manager, Hedge WMS

Register by : **April 15<sup>th</sup> 2019** • Course begins : **April 27<sup>th</sup> 2019**

*Classes held every Saturday for five consecutive weeks*

Contact us :

**+91 93495 12345**

