

RATHBONES VIRTUAL FINANCIAL AWARENESS COURSE 2024

Thursday 14 March 12.00pm - 1.30pm
Tuesday 16 July 2.30pm - 4.00pm
Monday 4 November 6.00pm - 7.30pm

Understanding investments can be like learning a different language. Investment professionals use terminology which, while native tongue to them, is often unrecognisable to those not in the investment community. At Rathbones, we believe in education to enhance your understanding of the wealth management environment. Once you understand your money, you are better equipped to make informed decisions.

Who should attend?

The course is suitable for anyone who wants to gain a better understanding of how investments work, from the most basic cash deposit to more complex investment instruments. We demystify the jargon and explain in plain English how these investments work and why you may wish to select them.

Course content

The course has been designed to cover the following areas:

Why invest?

This section considers the consequences of investing versus staying in cash, compound returns, inflation and the cost of living.

Asset classes

From simple cash deposits to complex private equity investments, we consider how each asset class works in practice.

Risk and reward

Here we delve into the jargon and provide clarity when considering what risk could mean for different types of investor.

How to invest

There are many ways to invest and many different services to select from. Here we explain these services and methods in detail.

An introduction to financial planning

An understanding of financial planning basics and how engaging the right professional can bring about positive outcomes in meeting your long-term plans and aspirations.

Please feel free to extend this invitation to friends and colleagues.

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14 MARCH

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16 JULY

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4 NOVEMBER