Rotman-Canadian Securities Institute: Innovating Your Wealth Management Practice

Rotman

CSI

Improve your advisory practice effectiveness leading to better client outcomes.

Space is limited, secure your spot for this exclusive program today.

Charged with helping their clients navigate through life changes and events and weather frequent financial upheavals, wealth advisors are constantly challenged by evolving technologies and the push to exceed client expectations.

In partnership with the Rotman School of Management, CSI is proud to open applications to our newest joint program, Innovating Your Wealth Management Practice.

The four day symposium offers a mix of academic and industry insight based on the latest research and practical experience.

The core curriculum includes:

» Deepening client communications and relationships
» Behavioural Finance
» Understanding human and family dynamics
» Managing technological and human resources
» Legacy planning for clients

At the end of the four days, you will be able to offer a new value proposition and build strong, intergenerational, multi advisory relationships with new and existing clients.

Our expert faculty will guide and support you throughout the program, along with industry experts and other like-minded leaders within the financial services industry.

What you'll learn

This program is designed for wealth advisors and managers, helping them:

» Recognize disruptors in the wealth management industry
» Underscore the importance of effective communications with clients
» Set realistic wealth management goals with clients
» Adhere to the rising regulatory standards in dealing with clients including Know Your Product Know Your Client, Conflicts of Interest and dealing with those clients who are vulnerable (i.e., aging).
» Identify client behavioral biases and help nudge them to better investment decisions.
» Know how digitization and automation can improve operational efficiencies and compliance
» Use big data and analytics to engage with new clients and better manage existing clients
» Integrate sustainable finance and responsible business practices into wealth management solutions
» Develop an understanding of the blockchain and how it might be integrated into your client solutions
» Evolve your practice by using Integrative Thinking concepts to employ new technologies and approaches, while at the same time continuing to provide personal service to clients
» Understand and navigate family dynamics when managing family wealth
» Effectively manage a family office
» Understand how endowments and foundations work
» Intra-family income shifting and tax strategies
» Develop an understanding of the process of developing a client's legacy and gift giving

Upon completion, partcipants will earn a Rotman-CSI joint certificate, digital badge, and counts towards earning your Excellence in Executive Leadership certificate. Join an elite circle of leaders building their own path to professional development and receive official recognition from Rotman.

4-day residential program
October 11- 15, 2023
White Oaks Resort
$6,500 CAD + HST

Program fee includes accommodations, all meals, and program materials

Questions?
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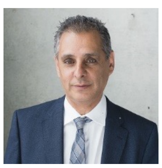
Schedule

Subject to change

Day 1	Day 2	Day 3	Day 4
» Key Trends in Wealth Management » Applied Behavioural Economics » Communication - Speaking with Confidence	» Building and Managing a Multi-Disciplinary Advisory Team » Impact Investing » New Technologies: Big Data, Blockchain, Machine Learning, Artificial Intelligence	» Integrative thinking and Leveraging Technology to Grow the Business » Fundamentals of an Integrated Wealth Practice » Setting Goals and Managing Risk for Clients	» Legacy, Inheritance and Succession Planning » Family Dynamics, Communication and Governance » Final Presentations



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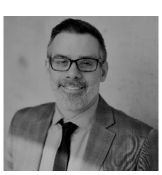

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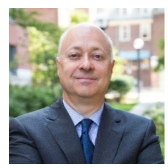

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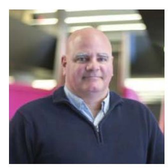

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