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## **RO2 (Investment Principles and Risk) Pre Exam Training, Tuesday 25<sup>th</sup> September, Fareham**

The Hants and Dorset PFS Regional Committee in association with the Insurance Institute of Southampton have organised a training day for those members who are studying for and taking the RO2 and RO4 examinations. Priority will be given to Hampshire based members of the PFS Hants and Dorset Region.

The cost of the day's training will be £35. Your attendance will be confirmed once the member has paid the fee invoice. There is a maximum of 15 attendees. If we are oversubscribed, you will be placed on a waiting list.

The day will commence at 0915 sharp (please arrive by 0900) and finish by 1645.

The venue is the offices of Brooks MacDonald, The Long Barn, Dean Estate, Wickham Road, Fareham, PO17 5BN.

The RO2 preparation day aims to increase your chances of passing the exam.

The course objectives are:

By the end of the event delegates will be able to:

By the end of the course, delegates will have covered the key elements of the RO2 syllabus with the emphasis on the CII Learning Outcomes, will have been introduced to the exam format and been given exam/revision tips so as to be able to:

- Analyse the characteristics, inherent risks, behaviour and correlation of the four Asset Classes

- Understand the macro-economic environment and its impact on the four Asset Classes
- Understand the merits and limitations of the main Investment Theories of the Efficient Market Hypothesis, Capital Asset Pricing Model, Modern Portfolio Theory etc.
- Apply the principles of the Time Value of Money (TVM)
- Analyse and explain the nature and impact of the main types of risk on Investment Performance
- Analyse the characteristics, inherent risks, behaviours and relevant tax considerations of Investment Products
- Apply the Investment Advice process
- Understand the principles of Investment Planning
- Analyse the performance of Investments (Sharpe Ratio, Information Ratio, Alpha etc.)

The course will be led by Phil Ahern, who is an accomplished, qualified and experienced trainer working in a financial services environment for over 35 years and specialising in the CII professional qualifications exams and generic training in pension, investment, protection and mortgage products within the regulatory environment.

To attend, please email the Hants and Dorset PFS Regional Committee on [hantsanddorsetpfs@outlook.com](mailto:hantsanddorsetpfs@outlook.com) and your attendance will be confirmed on payment of the £35 course fee.