

Solutions and Service Delivery > Provision of Family Office Services

Title	Manage the investment of family offices
Code	106616L5
Range	Managing investment for family offices in accordance with predetermined objectives. This applies to investment across different kinds of assets classes.
Level	5
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <p>1. Evaluate investment services for family office</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Evaluate the policies and structures of specific family office in order to understand and meet the needs of clients</li> <li>• Demonstrate professional understanding in investment, products and services in order to provide investment advice</li> </ul> <p>2. Construct the investment portfolio</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Formulate the investment objectives with clients taking into consideration the factors such as financial status of the family, wealth preservation, intergenerational wealth transfer, etc</li> <li>• Determine investment strategies and asset allocation of the family office in order to secure and grow the wealth over generations with reference to the investment philosophy of the family</li> <li>• Provide advice on booking of assets at different booking centers worldwide</li> <li>• Provide advice on protection of assets for preserving the wealth to the next generation</li> </ul> <p>3. • Manage the portfolio</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Manage budgeting and cash flow for the family to ensure liquidity</li> <li>• Monitor the market development and provide investment advice and ideas in order to achieve the investment objectives</li> <li>• Provide advice on risk analysis and suggest suitable risk management strategies</li> <li>• Coordinate with different parties (e.g. brokers) to execute trade orders</li> <li>• Oversight and evaluate performance of different service providers to ensure the investment strategies are executed ad planned</li> </ul>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Management of investment activities to ensure meeting of investment targets. The investment decisions made should be based on analysis on the investment targets, needs and interests of the families, etc.</li> </ul>
Remark	