

Marketing and Communication > Event Management / Investment Seminar

Title	Develop planning on investment seminar
Code	106647L4
Range	Developing investment seminars for private banking clients / prospects. This applies to client education programmes in different formats and different topics.
Level	4
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Evaluate the trends in investment seminars <ul style="list-style-type: none"> Be able to: <ul style="list-style-type: none"> • Evaluate the positioning and branding strategies of the private banking businesses in order to select topics of the seminars • Evaluate the recent developments in the economy and markets in order to select topics which private clients are interested in 2. Develop annual plan for investment seminar <ul style="list-style-type: none"> Be able to: <ul style="list-style-type: none"> • Coordinate with relationship managers to analyse the interests and informational needs for different segment of private banking clients • Coordinate with the Chief Investment Officer to develop the theme of the investment seminar series and the topics • Develop the schedules (e.g. frequency, timing, target participants, number of participants, etc.) for investment seminars • Determine objectives to be achieved for each investment seminar, e.g. promoting advisory services of the bank, generating new leads, promoting new investment ideas, etc. • Maintain a log of public seminars / presentations provided by the bank to facilitate review and future planning 3. Design content of investment seminar <ul style="list-style-type: none"> Be able to: <ul style="list-style-type: none"> • Evaluate the topics and identify suitable speakers through different channels • Cooperate with the speakers to design the agenda and content of the seminar • Provide suggestions and ideas on promoting the seminars to target participants
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Development of investment seminars for private banking clients / prospects. It should be based on analysis on the strategies of the private banking business, recent economic and market developments, preferences of target participants, etc.
Remark	