



STREET SMART INVESTING: ASK YOUR BROKER SALESMAN

ABOUT THE TRAINING PROGRAM

As part of NASBI Continuing Education in its objective to upgrade the skills of broker salesmen, the **STREET SMART INVESTING training program** is being offered. This program consists of one full day and will cover discussions on the different topics outlined below. Salesmen can use this as a tool to assist clients in identifying investment opportunities and provide meaningful insights in the area of financial investments.

PROGRAM AND COURSE OUTLINE

- I. **Introduction – Preparing to INVEST & CHOOSING THE RIGHT INVESTMENTS**
 - A. Saving and Investing
 - B. Setting investment goals & planning your financial goals
 - C. General Rules of Investing
 - D. Choosing investments wisely
- II. **Bank Products & Common Types of INVESTMENTS**
 - A. Deposit accounts
 - B. Stocks
 - C. Bonds
 - D. Mutual Funds
 - E. Exchange Traded Funds
 - F. Dollar Investments
- III. **Managing INVESTMENTS RISKS**
 - A. What are and why take RISKS?
 - B. Assessing Risks & how to protect yourself from RISKS
 - C. Knowing what is your RISK TOLERANCE
- IV. **Evaluating Performance & Managing your portfolio**
 - A. Yield/Return
 - B. Capital Gains & Losses
 - C. Tracking Performance
 - D. Importance of Research
- V. **SAFEGUARDING YOUR INVESTMENT**



ABOUT THE SPEAKER

JONATHAN L. RAVELAS, FVP and Chief Market Strategist of Banco de Oro joined the bank in 2002 to provide analysis on financial markets and macroeconomic developments in local and foreign economies. Prior to that, he held the same position in the treasury department of Equitable PCI Bank. From 1992 to 1998, he worked as strategist, analyst, equities dealer and portfolio manager in both money management and institutional equity brokerage settings. He has delivered many lectures in the field of forecasting, using different methods and applications to financial markets, here and abroad. Having worked in the financial markets for more than a decade he has been a leading advocate in creating and running a wide range of educational programs for private and institutional investors - ranging from the basics of financial markets to advanced trading strategies. His economic commentaries regularly appear in Business World, the Business Mirror, the Philippine Daily Inquirer and the Asian Wall Street Journal. He is also a well-known commentator appearing regularly on ANC, Bloomberg and BBC. Mr. Ravelas has a Bachelor's degree in Management of Financial Institutions from the De La Salle University in Manila.

- A. Protecting your Investments
- B. Record Keeping
- C. Investment Scams

TRAINING FEE AND SCHEDULE

	NASBI MEMBER	NON-NASBI MEMBER
1. Fees	P3,500 per person	P4,000 per person
2. Date	February 20, 2014 (Thursday)	
3. Time/Duration	9:00 Am to 5:00 PM	
4. Venue	Training Room, ACI-MART Office, Penthouse PDCP Bank Centre, V.A. Rufino cor L.P. Leviste Sts. Salcedo Village, Makati City	
5. Participants	Ideal for broker salesmen • Acceptance will be given on a first come, first served basis • NASBI members will be given priority	
6. Maximum Participants	30 participants	
7. Reservation	All reservations will be considered confirmed if not cancelled three (3) working days before the scheduled training date.	
8. Payments	Check payments should be made to the: NATIONAL ASSOCIATION OF SECURITIES BROKER SALESMEN, INC.	

For inquires and/or confirmation of registration please contact the NASBI Program Coordinator and/or fill-up the registration form and submit via fax or email on or before **February 10, 2014 (Monday)** to:

PROGRAM COORDINATOR

Mr. Gray Tacda
 Chairman, NASBI Education Committee
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