

TGS-2025055734

IN-PERSON WORKSHOP

Behavioral Finance



Target Audience:

Private Bankers, Wealth Managers, Financial Advisors, & Independent Financial Advisors

Duration: 4 CPD Hours

Fee: SGD 500 per participant

EARLY BIRD DISCOUNT

Enjoy **10% discount** when you register **one (1) month before** the course commencement date.

Key Learning Outcomes

- Identify and analyze behavioral biases in clients' financial decision-making.
- Develop strategies to reduce the influence of biases in investment policies.
- Build stronger, trust-based relationships with clients using behavioral insights.
- Implement tools and techniques to enhance client outcomes and advisory success.

Harness behavioral insights to strengthen client relationships, manage biases, and drive smarter investment outcomes.

Program Highlights

1. Introduction to Behavioral Finance

- Definition and importance of behavioral finance in advisory services.
- Overview of common biases affecting investment decisions.
- How behavioral insights can improve client relationships and portfolio performance.

2. Enhancing Adviser–Client Relationships through Behavioral Finance

- Understanding clients' unique decision-making styles and behavioral tendencies.
- Strategies for building trust and addressing skepticism through empathy and transparency.
- Personalizing financial advice using behavioral insights and communication techniques.
- Real-world applications: Managing biases like loss aversion, overconfidence, and herd behavior.

3. Mitigating Behavioral Biases in Investment Policies

- Designing bias-resistant investment policies with clear goals, diversification, and predefined decision rules.
- Techniques for rational decision-making: Automation, scenario planning, and behavioral nudges.
- Incorporating quantitative tools to support bias mitigation.

4. Monitoring Behavioral and Emotional Biases

- Identifying key biases: Loss aversion, overconfidence, herd behavior, anchoring, and recency bias.
- Techniques to uncover clients' hidden biases during consultations.
- Practical tools for analyzing how biases impact portfolio performance.
- Activity: Case study analysis of client biases in portfolio decisions.

PRACTICE & APPLICATION

- Participate in role-play scenarios to uncover and address client biases.
- Apply behavioral finance strategies in real-world advisory situations.

KEY VALUE PROPOSITION

- Applies momenta's signature hands-on approach: role plays, coaching, and feedback to embed skills.
- Aligns behavioral finance with advisory frameworks for immediate relevance and application.
- Equips participants with actionable tools to deliver bias-aware advice that builds trust and improves portfolio performance.

*Completion of this course can be counted towards the fulfillment of the non-STs portion for CACS CPD. This course is recognized under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met. Please note that in **no way** does this represent an endorsement of the quality of the training provider and course. Participants are advised to assess the suitability of the course and its relevance to his/her business activities or job roles. The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS provides up to 70% course fee subsidy support for direct training costs subject to a cap of S\$500 per candidate per course subject to all eligibility criteria being met. Find out more on www.ibf.org.sg

Up to 70% Funding*
for Singaporeans and PRs

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Funding: Financial Training Scheme (FTS) www.momenta.biz



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