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leadersdrivingperformance

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.

Up to 70% Funding*
for Singaporeans and PRs
Terms & Conditions apply

Funding: Financial Training Scheme (FTS)

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