

TGS-2026063546

IN-PERSON WORKSHOP

INSIDE THE INVESTOR'S MIND: BEHAVIORAL & NEUROSCIENCE STRATEGIES



Target Audience

Relationship Manager (Private Bank),
Investment Consultant (Private Bank), Senior
Client Advisor, Fund Specialist and Portfolio
Manager

Duration: 8 CPD Hours

Fee: SGD 1,300 per participant

EARLY BIRD DISCOUNT

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

Learning Objectives

- Strengthen advisory effectiveness by understanding investor behavior and applying behavioral and neuroscience insights.
- Design, explain, and justify suitable investment products and end-to-end solutions with clarity and empathy.
- Build stronger investor conversations by identifying emotional drivers, behavioral biases, and decision-making patterns.



Build stronger client relationships and investment conversations by understanding how investors think, feel, and make decisions.

Successful Investor Advisory Framework

- **The Brain of Money – Starting Exercise**
 - Understand how emotions, risk perception, and uncertainty influence investor decisions.
 - Recognize how market stress affects judgment and timing.
- **Bias Lab – Spot the Triggers**
 - Identify common investor biases such as loss aversion, overconfidence, herding, and anchoring.
 - Link behavioral patterns to product preferences and decision errors.
 - Anticipate bias-driven reactions before they disrupt portfolio outcomes.
- **Choice Architecture & Product Framing**
 - Learn how framing, defaults, and structure influence client choices.
 - Position products clearly within an end-to-end portfolio solution.
 - Simplify complex product decisions without oversimplifying risk and trade-offs.
- **Investor Typologies & Decision Styles**
 - Apply investor profiles to better understand client behavior.
 - Align product recommendations with different investor mindsets.
- **From Insight to Action**
 - Turn behavioral insights into practical advisory habits.
 - Apply bias-aware thinking in reviews, recommendations, and market updates.

ASSESSMENT

- Formative Assessment – Case Studies / Role Play Scenarios
- MCQ

KEY VALUE PROPOSITION

- Enhances advisory effectiveness by integrating behavioral insight with product strategy.
- Improves product positioning and value demonstration in complex conversations.
- Builds client trust through clearer, calmer, and more empathetic communication.

This course addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

- Product Advisory (Proficiency Level 4)

Participants are encouraged to access the IBF MySkills Portfolio (<https://www.ibf.org.sg/home/for-individuals/resource-tools/myskills-portfolio>) to track their training progress and skills acquisition against the Skills Framework for Financial Services. You can apply for IBF Certification after fulfilling the required number of Technical Skills and Competencies (TSCs) for the selected job role. Find out more about IBF certification and the application process on <https://www.ibf.org.sg/home/for-individuals/ibf-certification/why-be-ibf-certified>

Up to 70% Funding*
for Singaporeans and PRs

Funding:
IBF Standards training Scheme (IBF-STTS)



www.momenta.biz

