

TGS-2025059699

IN-PERSON WORKSHOP

Decoding Private Investments: A Guide to VC, PE, and Debts



Target Audience

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

Duration: 4 CPD Hours

Fee: SGD 550 per participant

EARLY BIRD DISCOUNT

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

Learning Objectives

- Understand core concepts and strategies in alternative investments
- Assess VC, PE, and private debt within portfolio contexts
- Analyse opportunities, risks, and return trade-offs
- Build client-aligned strategies with compliance in mind

Gain practical insights into private investments to help you evaluate opportunities, communicate value clearly to clients, and position alternative assets effectively within diversified portfolios.



PRIVATE INVESTMENTS FRAMEWORK

- 1. Alternative Investment Fundamentals**
 - Key structures and characteristics
 - Differences vs traditional asset classes
- 2. Market Dynamics & Risk**
 - Trends influencing private markets
 - Risk-return considerations
- 3. Portfolio Construction**
 - Role of alternatives in diversification
 - Enhancing portfolio resilience
- 4. Asset Class Insights**
 - **Private Equity:** strategies and performance drivers
 - **Venture Capital:** funding stages, risks, and returns
 - **Private Debt:** credit structures and opportunities
- 5. Client Advisory**
 - Tailoring strategies for client needs
 - Regulatory and ethical considerations

PRACTICE & APPLICATION

- Apply alternative investment strategies through simulations
- Analyse real-world case discussions
- Strengthen portfolio construction and client communication skills

KEY VALUE PROPOSITION

- Clear framework for understanding and positioning private investments
- Practical insights aligned to real-world advisory scenarios
- Structured tools to evaluate and integrate alternatives into portfolios
- Balanced approach across risk, return, and compliance considerations

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.iftf.org.sg

Up to 70% Funding

Terms & Conditions apply

Learn more:

Financial Training Scheme (FTS)



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