



Introduction to Financial Institutions

Course Description

This programme is designed to give delegates a practical understanding of the wide variety of Financial Institutions.

Target Audience

Brokers, technicians, underwriters and other staff requiring an introduction to the different types of Financial Institutions. It will be of particular value to those involved in the insurance of these risks.

Course Objectives

At the end of the course the delegates will be able to:

- Explain the main types of Financial Institutions and the terminology that is used
- Understand the different functions they perform and some of the internal controls they have to comply with.

Course Contents

Describe the different types of Financial Institutions and explain what they do:

- Retail Banks
- Global Banks
- Merchant Banks
- Investment Banks
- Building Societies
- Independent Financial Advisors (IFAs)
- Stock Brokers
- Venture capitalist firms
- Private Equity Houses
- Investment trusts
- Corporate financiers
- Fund managers
- Hedge funds
- Pension funds
- Asset managers
- Post Offices
- Currency Exchanges
- Mergers and Acquisitions
- Restructuring
- Initial public offerings
- Leasing

Trainer Jonathan Besso-Cowan BSc MBA PhD FCII

Dr Jonathan Besso-Cowan is a business trainer, academic and entrepreneur in insurance. He has specialised in non-marine insurance, reinsurance and accounting training and has published material on regulation at Lloyd's and risk management. Educated in music (Guildhall), chemistry (Manchester) and business (London Business School and New York University), he entered the insurance broking sector in the City in 1980 receiving his FCII in 1982. He was for many years a Registered Insurance Broker and became Chief Executive of a Lloyd's Broking firm. Recently he obtained the Investment Management Certificate of the UK Society of Investment Professionals and is registered by the FSA for Discretionary Fund Management. His PhD, on dilemma resolution in intercultural management teams, was awarded in 2003 by Cranfield University.

Duration 1 day

Date **14th September 2010**

Time 9.30 am – 5.00 pm

Venue IMC Training Rooms, 16 St Clare Street, London EC3N 1LQ

Fee **£245.00 +VAT** (including refreshments and buffet lunch)

Bookings To reserve a place on this course please contact Tony Gregory
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