

Foundations of Finance

CORE CERTIFICATION

Program Description

The Foundations of Finance Certification is designed to provide professionals with a solid understanding of the functions and roles played by modern financial institutions and their key lines of business, as well as foundational knowledge of the industry's basic products and service functions. Although the main focus is on the business units and related support areas that drive financial institution revenues and profits, the program also provides an overview of the impact that regional, national, and global macroeconomic conditions and industry trends has on the strategic and operational behavior of the institution. In addition, the Certificate covers the impact of the current regulatory environment on financial institutions.

Required Courses Included In Curriculum

- Financial Institution Trends
- Understanding the Road Map and Bank P&L
- The Trade Life Cycle
- Financial Industry Risks
- Understanding Credit and Credit Risk
- Fundamental Financial Math
- Quantitative Methods
- Yield Curve Analysis
- Fixed Income and Money Market Instruments
- Public and Private Equity
- Foreign Exchange Transactions
- Option Fundamentals
- Introduction to Derivative Products
- Compliance, Legal and Regulatory Structures

The Globecon Institute reserves the right to modify, change or substitute Courses or Learning Units at any time, to guarantee a relevant and balanced learning experience.

Study Requirements and Delivery

Delegates for this certification are expected to undertake between 10 – 12 hours effort per week. This grid below indicates the types of activities that delegates would undertake.

Learning Activity	Time allocated
Online, self study activities / resource room self study	85 hours
Live, in-class lectures and review	24 hours
Online video and/or audio lectures/Webinars	16 hours
Online mentorship and forum participation	10 hours
Assessment preparation	15 hours
Total Hours	150 hours

This certification is a blended education approach combining:

- A comprehensive student manual which serves as the guide for education activity;
- Online self-study materials, exercises, quizzes and learning activities;
- Live, face-to-face lectures and reviews;
- Pre-recorded video and / or audio lectures; and
- Online learning community through facilitated discussion forums, chat rooms and LiveHelp

Who Should Enroll

Any professional working in the banking, financial services and insurance sector who requires a solid understanding of the business, including key technical skills used daily in the businesses. This includes, front, middle and back office professionals, from new hires/graduates/freshers to middle level managers. No prior in-depth knowledge of accounting, economics, or finance is necessary, as this certification.

What You Will Learn

Upon completion of this certificate program, you will be able to:

- Identify the main functions and lines of business employed by major financial institutions
- Evaluate the role that financial institutions play within the economy
- Understand how economic conditions, business cycles, etc. affect financial institutions' business, marketing and operational strategies and tactics
- Understand how financial institutions make money
- Obtain an understanding of the basic products and services offered by financial institutions to its clients, particularly in the equity and fixed income areas
- Learn fundamental techniques universally applied in the financial markets, including financial math, elementary statistics and yield curve analytics

Certification Assessment

One or more Mastery Tests and Assessment Activities are required for each subject in this certification. The goal of the tests and activities is to ensure delegates are able to apply their knowledge and skills to real industry situations. Mastery Tests are administered in person. Assessment Activities may include one or more or combination of case studies; exercises; project work; essays; and, reports.

Course completion requirements

Delegates must successfully complete all core subjects (a total of 14 credits) within one and a half (1.5) years of the initial date of enrolment. Typical delegates can achieve this qualification within 4 – 6 months.

Course Admission requirements

Delegates must be working or intending to work in the financial market sector.

Other Intermediate Certifications

The Foundations of Finance Certification provides successful delegates the core knowledge required in the financial services sector. Intermediate and Advanced specialized tracks are available to build on this foundation with advanced specialization and certifications.