

TGS-2025059645

IN-PERSON WORKSHOP

Evaluating Digital Assets, Bitcoin & Blockchain for Clients



Target Audience:

Wealth Managers, Bankers and Financial Advisers

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

- Guide clients to understand Bitcoin and blockchain through clear, relatable explanations.
- Identify and evaluate the risks and potential of cryptocurrency investments to support informed decisions.
- Design crypto strategies that diversify and strengthen client portfolios for long-term growth.

Explore how Bitcoin and blockchain are transforming wealth management, from risk evaluation to portfolio integration for modern clients.

Course Outline

Simplify Bitcoin and Blockchain

- Demystify digital asset concepts for clients.
- Communicate cryptocurrency fundamentals in client-friendly terms.
- Address misconceptions with clarity and confidence.

Assess Risks and Opportunities

- Evaluate the volatility, regulatory risks, and growth potential of cryptocurrency.
- Present balanced insights to guide informed investment decisions.
- Stay ahead of trends in blockchain applications.

Enhance Portfolios

- Integrate Bitcoin and blockchain into innovative portfolio strategies.
- Present successful case studies of cryptocurrency-driven growth.
- Demonstrate leadership in advising on emerging financial trends.

KEY VALUE PROPOSITIONS

- Aligns Bitcoin and blockchain knowledge with your bank's advisory framework for immediate client relevance and application.
- Applies momenta's signature practical approach: clear communication techniques, balanced risk assessments, and real-world case studies to embed confident crypto advisory skills.
- Equips wealth managers with actionable tools to simplify digital assets, assess opportunities, and design innovative portfolio strategies that drive client trust and growth.

PRACTICE & APPLICATION

- Role-play adviser-client conversations to simplify crypto concepts, assess risks, and present portfolio strategies with confidence.

Completion of this course can be counted towards the fulfillment of the non-STP 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.ibf.org.sg

Up to 70% Funding

Terms & Conditions apply

Learn more:

Financial Training Scheme (FTS)



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