



### ***Prestwood® Professional Investment Course***

The Prestwood Investment Training Course will cover all aspects of this area of the software, more specifically:

Investment program set-up options and how to create or modify:

- Investment Types
- International Regions
- Countries & Currencies
- Sectors
- Tax Groups
- Companies
- Funds
- Moving or deleting companies or funds
- Asset Allocation/Risk Allocation/Sector Allocation
- Client Portfolios
- Model Portfolios
- Fund Selection Templates
- Designing Reports

Viewing and printing information:

- Client Enquiry
- Performance Graphs
- Performance Tables
- Prices, Graphs and Splits
- Asset Allocation Warning
- Performance Review Tables and Charts

Entering information:

- Entering Prices
- Uploading Prices
- Importing Wrap Feeds
- Investment Calculator

Extracting information:

- Investment Reports (Valuations)
- Product Features Reports
- Fund Lists
- Investment Summaries
- Graphs

The above description is intended only as a guide. The actual course content may vary from that listed above.