



Institute of Banking and Finance of Trinidad and Tobago

PORTFOLIO MANAGEMENT

Client-Centric Portfolio Construction & Investment Advisory

Two (2) Day Workshop Outline



WORKSHOP OVERVIEW

This two-day workshop is designed to equip financial advisors, including insurance professionals, with the knowledge and practical skills required to construct, manage, and review client investment portfolios in a modern advisory environment.

The programme integrates financial planning principles, investment analysis, and portfolio construction techniques into a unified, client-focused framework. Participants will learn how to translate client needs and risk profiles into structured investment solutions using a combination of traditional and modern investment products.

The workshop is highly interactive and combines conceptual discussions with hands-on exercises, case-based learning, and Excel applications.

LEARNING OBJECTIVES

Financial Advisory & Client Framework

- Understand the structure and function of financial markets in an advisory context
- Apply the financial planning process to real client situations
- Conduct client risk profiling and assess suitability
- Recognize behavioural biases affecting investment decisions



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Investment Knowledge & Analysis

- Differentiate between key investment products (equities, bonds, mutual funds, ETFs)
- Interpret basic stock and bond characteristics and risk-return drivers
- Apply foundational techniques in investment analysis

Portfolio Construction & Management

- Develop Investment Policy Statements (IPS) aligned to client goals
- Apply asset allocation principles to construct diversified portfolios
- Build model portfolios based on client risk profiles (income, balanced, growth)
- Evaluate portfolio performance and implement rebalancing strategies

Practical Application

- Integrate client profiling, investment selection, and portfolio construction into a cohesive advisory solution
- Present and justify portfolio recommendations in a structured format

TARGET AUDIENCE

- Financial Advisors
- Insurance Agents transitioning into investment advisory roles
- Relationship Managers
- Entry to intermediate-level investment professionals



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METHODOLOGY

- Facilitated presentations
 - Guided discussions
 - Excel-based exercises
 - Real-world case studies
 - Group-based portfolio construction activity
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PARTICIPANT REQUIREMENTS

Participants are required to bring:

- Laptop with Microsoft Excel installed
- Financial calculator (optional but recommended)

Pre-reading material may be distributed prior to the workshop.



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FACILITATORS

WINSTON BOODRAM, MBA

Mr. Winston Boodram is the current Country Treasurer at CIBC Caribbean Trinidad. He is a career trader and treasury management professional with more than 20 years' experience in this field having worked and held senior management levels at financial institutions in Trinidad and Canada.

Winston holds a Master of Business Administration from Heriot-Watt University and has attended numerous industry related training programs in New York, Miami, London, Amsterdam and Port of Spain.

ANDRE FALBY

Mr. Andre Falby is a seasoned banking professional with over 30 years of experience in risk management, business lending, and corporate and investment banking. He possesses a deep understanding of financing projects across diverse industries, both locally and regionally. Currently, he serves as the Chief Risk Officer at Trinidad & Tobago Mortgage Bank (TTMB), where he leads the bank's enterprise risk management functions.

Andre holds an International MBA with a specialization in finance. He is a Certified Anti-Money Laundering Specialist (CAMS) and holds an ESG Professional Certificate in International Sustainable Business (ISB) Advisor Level 1 from the International Association for Sustainable Economy.

Beyond his professional roles, Andre is an active educator, serving as an adjunct lecturer at UWI Roytec, The UWI Open Campus, and Cipriani College of Labour & Co-operative Studies. He is a frequent facilitator of credit and risk management workshops at the Institute of Banking and Finance of Trinidad & Tobago and contributes to the institute's professional development programs as an examiner/moderator for the Certified International Risk Manager (CIRM) and Professional Certificate for Financial Advisors (Cert. FA) programs.