Immersion Week

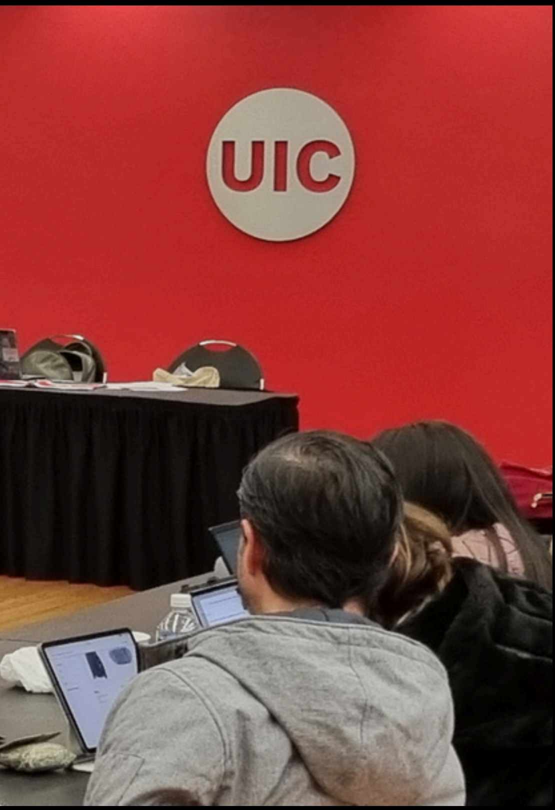
UNIVERSITY OF ILLINOIS CHICAGO

Masters Level Certificate in Trade and Financial Management

From October 7th to 11th - USA Chicago, Illinois

FUNDACIÓN ZONAMERICA

pmla



Cost

For **companies on campus** wishing to train their employees, there's

20% OFF

co-financed by INEFOP.

USD 2.400 per person

*Full price USD 3.000

To reserve a spot, a 50% deposit of the total amount is required by August 5th, two months before the trip.

The remaining 50% must be paid 30 days before the trip.

The program is subject to a minimum number of participants for its realization.

What does it include?

- On-site classes at UIC.
- Visits to two organizations with transportation to and from the University.
- Course materials.
- University student identification cards (I-Cards).
- Masters Level Certificate in Trade and Financial Management issued by UIC.

The following are not included in the costs

- Airfare
- Accommodation and meals
- Internal transportation
- Recommended supplementary educational materials
- Costs associated with social events
- Medical insurance
- Other personal expenses

Presentation

Immersion Week at the University of Illinois Chicago is an initiative by PMLA in partnership with Fundación Zonamerica, aimed at providing a learning and exchange experience in one of the most impactful cities in the global financial world.

Its objective is to provide comprehensive and advanced training in financial and investment management through a practical and applied approach.

Participants will acquire essential skills for managing portfolios, developing financial plans, understanding futures markets, and applying agile strategic analysis and planning techniques.

By the end of the program, participants will have engaged with top-tier financial companies, equipping them to successfully face the challenges of the sector.

Target Audience

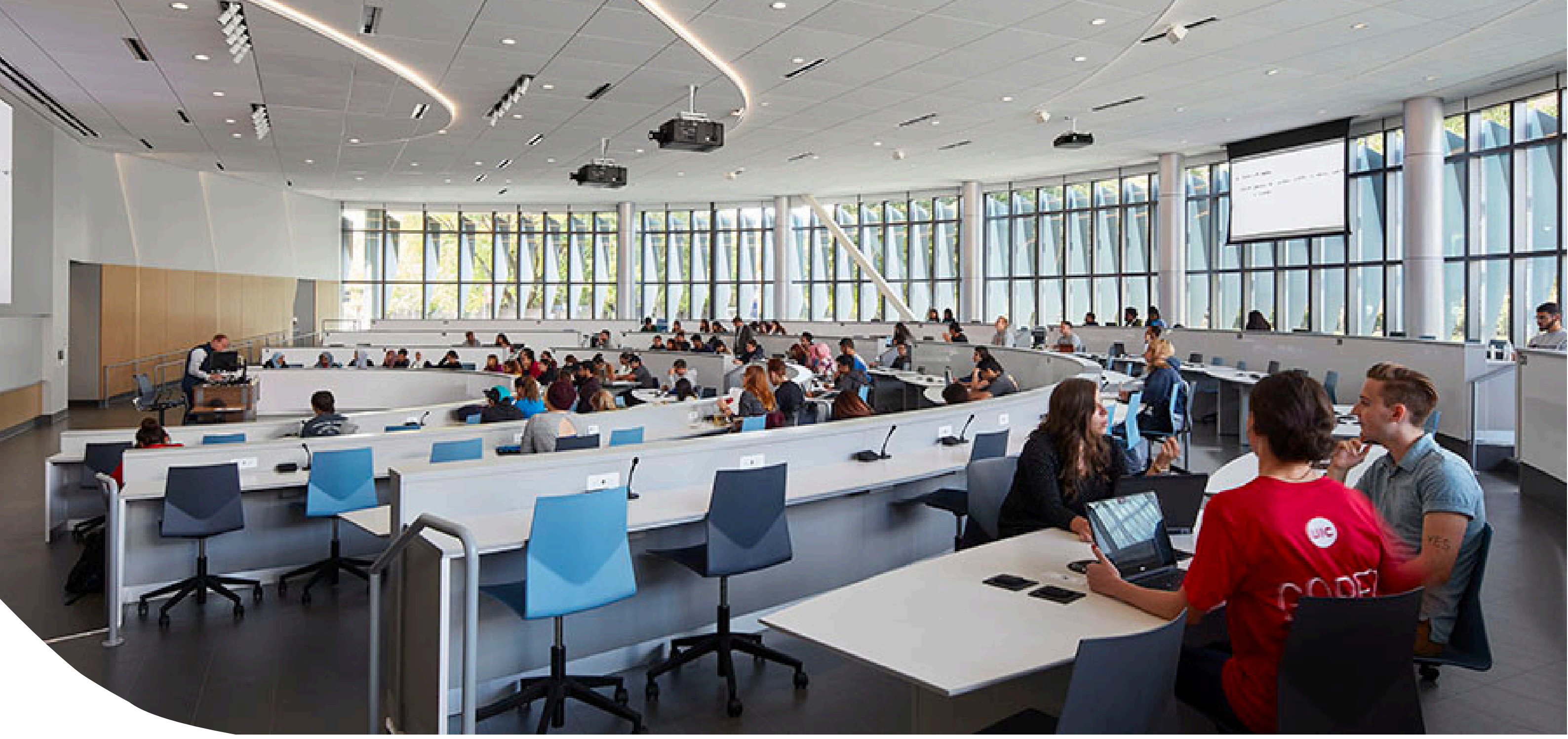
- Professionals responsible for managing investment portfolios who are looking to update and refine their knowledge and skills in asset management and investment strategies.

- Analysts seeking to delve deeper into advanced portfolio analysis techniques and financial planning strategies.

- Traders and operators aiming to gain deep knowledge of options and futures markets to optimize their trading strategies.

- Professionals responsible for financial risk management seeking to learn advanced techniques in hedging and risk analysis using options and futures.

- Students pursuing master's or doctoral programs in fields related to finance who seek to complement their academic training with practical and advanced knowledge.



What is Immersion Week about?

The program combines specialized lectures and professional visits to companies in the financial sector.
For five days in an intensive format, participants will attend:

- Classes and specialized lectures conducted by professors from the University of Illinois Chicago (UIC) and PMLA.

- Visits to organizations and institutions that complement the information shared by the presenters. These visits may include*:
  - The Federal Reserve Bank of Chicago
  - The Money Museum
  - The Chicago Board of Exchange
  - Other top financial/investment management companies in Chicago.

*Professional visits are subject to change.

Faculty

Ma, Lingjie

Clinical Professor, Assistant Dean for Partnership Programs
Department of Finance

Ozgur, Arslan-Ayaydin

Clinical Professor and Assistant Department Head
UIC Department of Finance

De los campos, Antonio

Director of PMLA®
Economist, MCPM®, PMP®

Mario Hernández

Director of PMLA®
Computer Systems Engineer, PMP®

Program

01

Portfolio Management

In this seminar we will look at the art and science of selecting and overseeing a group of investments that meet the long-term financial objectives and risk tolerance of a client, a company, or an institution. Investment portfolio management involves building and overseeing a selection of assets such as stocks, bonds, and cash that meet the long-term financial goals and risk tolerance of an investor. Portfolio management requires clear long-term goals, clarity from the IRS on tax legislation changes, understanding of investor risk tolerance, and a willingness to study investment options

02

Financial Plan Development

Financial planning involves looking at a client's entire financial picture and advising them on how to achieve their short- and long-term financial goals. Financial planning is the process of taking a comprehensive look at an organization’s financial situation and building a specific financial plan to reach its goals. As a result, financial planning often delves into multiple areas of finance, including investing, taxes, savings, insurance and more.

03

Options and Futures Markets

In this seminar, we will examine the obligations of options and futures and their roll in the financial world. Futures and options are stock derivatives that are traded in the share market and are a type of contract between two parties for trading a stock or index at a specific price or level at a future date. By specifying the price of the trade, these twin derivatives safeguard the investor against future fluctuations in the stock market. However, the actual futures and options trade is often far more complex and fast-moving.

04

Asset Management

Asset management is the practice of increasing total wealth over time by acquiring, maintaining, and trading investments that have the potential to grow in value. Asset management professionals perform this service for others. They may also be called portfolio managers or financial advisors. The goal of asset management is to maximize the value of an investment portfolio over time while maintaining an acceptable level of risk. Asset management as a service is generally provided by specialized firms to individuals, government entities, corporations, and institutional investors.

05

Portfolio Analysis

Portfolio analysis is the process of evaluating and assessing a collection of investments, known as a portfolio, to understand its performance, risks, and potential returns. Investment management involves analyzing portfolios that consist of various investments, such as stocks, bonds, and alternative options, to assess their performance and associated risks. Regularly analyzing the portfolio is crucial for effective investment management.

06

Connecting Strategy, Agility and Change Management

No matter the knowledge domain or the vertical in which the organization operates, in a revolutionizing world, it will have to develop an agile company that allows it to adapt to changing and uncertain environments by leading the technical and human side of the organization. The seminar offers a general framework of the organization that connects and integrates strategy, agility and organizational change.

Frequently Asked Questions

Do I need to have a visa?

Each participant must have a valid visa, and it is their responsibility to obtain it.

Is a university degree required?

No, a university degree or other certificates are not required.

Registration process

The participant must complete a form with their details. Once we receive the completed form, their place is **RESERVED**, and they have 7 business days to **CONFIRM** their spot by paying 50% of the price. Once CONFIRMED, they have up to 30 days before the trip to settle the remaining 50%.

What forms of payment do you accept?

- Bank transfer
- Credit card (up to 3 installments)
- Debit card
- Paganza
- Redpagos

What language is the program conducted in?

The program is entirely conducted in English.

Registrations and inquiries

092-452-956

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