

Postgraduate Diploma Financial Marketing





Postgraduate Diploma Financial Marketing

- » Modality: online
- » Duration: 6 months
- » Certificate: TECH Technological University
- » Dedication: 16h/week
- » Schedule: at your own pace
- » Exams: online

Website: www.techtitute.com/us/school-of-business/postgraduate-diploma/postgraduate-diploma-financial-marketing

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01 Welcome

In the financial sector, marketing has become increasingly important over the years. As the public's perception of banking has changed, the messages and the way of connecting with the audience have also evolved, adapting to the new type of financial consumer. In order to prepare students for the changes that have taken place in Financial Marketing and, at the same time, provide them with knowledge that will boost their career, TECH has developed the following degree program. With this specialization, the student is increasing their future possibilities to access more relevant positions or increase their salary.



Postgraduate Diploma in Financial Marketing
TECH Technological University



“

You will be the next reference in Financial Marketing thanks to everything that this TECH programs offers you”

02

Why Study at TECH?

TECH is the world's largest 100% online business school. It is an elite business school, with a model based on the highest academic standards. A world-class centre for intensive managerial skills training.



“

TECH is a university at the forefront of technology, and puts all its resources at the student's disposal to help them achieve entrepreneurial success"

At TECH Technological University



Innovation

The university offers an online learning model that combines the latest educational technology with the most rigorous teaching methods. A unique method with the highest international recognition that will provide students with the keys to develop in a rapidly-evolving world, where innovation must be every entrepreneur's focus.

"Microsoft Europe Success Story", for integrating the innovative, interactive multi-video system.



The Highest Standards

Admissions criteria at TECH are not economic. Students don't need to make a large investment to study at this university. However, in order to obtain a qualification from TECH, the student's intelligence and ability will be tested to their limits. The institution's academic standards are exceptionally high...

95% | of TECH students successfully complete their studies



Networking

Professionals from countries all over the world attend TECH, allowing students to establish a large network of contacts that may prove useful to them in the future.

100,000+
executives trained each year

200+
different nationalities



Empowerment

Students will grow hand in hand with the best companies and highly regarded and influential professionals. TECH has developed strategic partnerships and a valuable network of contacts with major economic players in 7 continents.

500+ | collaborative agreements with leading companies



Talent

This program is a unique initiative to allow students to showcase their talent in the business world. An opportunity that will allow them to voice their concerns and share their business vision.

After completing this program, TECH helps students show the world their talent.



Multicultural Context

While studying at TECH, students will enjoy a unique experience. Study in a multicultural context. In a program with a global vision, through which students can learn about the operating methods in different parts of the world, and gather the latest information that best adapts to their business idea.

TECH students represent more than 200 different nationalities.



TECH strives for excellence and, to this end, boasts a series of characteristics that make this university unique:



Learn with the best

In the classroom, TECH's teaching staff discuss how they have achieved success in their companies, working in a real, lively, and dynamic context. Teachers who are fully committed to offering a quality specialization that will allow students to advance in their career and stand out in the business world.

Teachers representing 20 different nationalities.



At TECH, you will have access to the most rigorous and up-to-date case studies in the academic community"



Analysis

TECH explores the student's critical side, their ability to question things, their problem-solving skills, as well as their interpersonal skills.



Academic Excellence

TECH offers students the best online learning methodology. The university combines the Relearning method (a postgraduate learning methodology with the highest international rating) with the Case Study. A complex balance between tradition and state-of-the-art, within the context of the most demanding academic itinerary.



Economy of Scale

TECH is the world's largest online university. It currently boasts a portfolio of more than 10,000 university postgraduate programs. And in today's new economy, **volume + technology = a groundbreaking price**. This way, TECH ensures that studying is not as expensive for students as it would be at another university.

03

Why Our Program?

Studying this TECH program means increasing the chances of achieving professional success in senior business management.

It is a challenge that demands effort and dedication, but it opens the door to a promising future. Students will learn from the best teaching staff and with the most flexible and innovative educational methodology.



“

We have highly qualified teachers and the most complete syllabus on the market, which allows us to offer you training of the highest academic level"

This program will provide students with a multitude of professional and personal advantages, particularly the following:

01

A significant career boost

By studying at TECH, students will be able to take control of their future and develop their full potential. By completing this program, students will acquire the skills required to make a positive change in their career in a short period of time.

70% of participants achieve positive career development in less than 2 years.

02

Develop a strategic and global vision of companies

TECH offers an in-depth overview of general management to understand how each decision affects each of the company's different functional areas.

Our global vision of companies will improve your strategic vision.

03

Consolidate the student's senior management skills

Studying at TECH means opening the doors to a wide range of professional opportunities for students to position themselves as senior executives, with a broad vision of the international environment.

You will work on more than 100 real senior management cases.

04

Take on new responsibilities

The program will cover the latest trends, advances and strategies, so that students can carry out their professional work in a changing environment.

45% of graduates are promoted internally.

05

Access to a powerful network of contacts

TECH connects its students to maximize opportunities. Students with the same concerns and desire to grow. Therefore, partnerships, customers or suppliers can be shared.

You will find a network of contacts that will be instrumental for professional development.

06

Thoroughly develop business projects

Students will acquire a deep strategic vision that will help them develop their own project, taking into account the different areas in companies.

20% of our students develop their own business idea.

07

Improve soft skills and management skills

TECH helps students apply and develop the knowledge they have acquired, while improving their interpersonal skills in order to become leaders who make a difference.

Improve your communication and leadership skills and enhance your career.

08

Be part of an exclusive community

Students will be part of a community of elite executives, large companies, renowned institutions, and qualified professors from the most prestigious universities in the world: the TECH Technological University community.

We give you the opportunity to train with a team of world renowned teachers.

04

Objectives

The objective of this Postgraduate Diploma is to instruct students in the main marketing tools, especially focused on the financial sector with knowledge in macroeconomics, financial products of all kinds and specific techniques of inbound and branding for the field of finance.



“

Having knowledge from the Postgraduate Diploma in Financial Marketing will be the key that will open the door to the most important managerial positions in your field of work"

TECH makes the goals of their students their own goals too.
Working together to achieve them.

The **Postgraduate Diploma in Financial Marketing** trains students to:

01

Develop customer-oriented strategies, thinking and acting in a harmonized way, where the customer and the distribution channel are the focus of the financial institution's attention

02

Formulate short-, medium- and long-term business plans for the office network, so that decisions can be made systematically and in a structured manner with respect to the company's strategy





03

Perform different economic, financial and strategic analyses of a company and its comparison with the main competitors and new business models

04

Define the management information relevant to the tactical and strategic monitoring of a credit institution

05

Structure and Content

This program has been conceived with the help of the best professionals in Financial Marketing today, who form an unparalleled teaching team with expertise in the subject matter taught. The student benefits from their extensive experience to improve their skills, with unique didactic material that employs the best methodology. As a result, the graduate will be an expert in Financial Marketing, being able to access even the most interesting and high-ranking managerial positions.



“

This specialization will be key to you business career. Don't hesitate and enrol now in order to master the secrets of Financial Marketing”

Syllabus

All the content offered in this Postgraduate Diploma has been created following the highest educational standard at TECH, guaranteeing that the student has access to first class reading material.

During the 375 hours of the program, the teaching staff presents students with practical cases in the field of Financial Marketing in which, using the knowledge acquired in the program, complex situations are solved. Thanks to this, the student obtains a contextual teaching, using the marketing techniques in their own work from the very moment of the course.

A syllabus that is focused on the professional needs of the students, with the possibility to completely adapt the study of the content to their own rhythm of life. This is achieved thanks to reduced reading load, supported by audiovisual material and without the need to complete an final project piece of work.

This Postgraduate Diploma takes place over 6 months and is divided into 4 modules:

- Module 1.** The Economic Environment and Financial Markets
- Module 2.** Financial Products and Banking Asset Products
- Module 3.** Collective Investment
- Module 4.** Financial Marketing



Where, When and How is it Taught?

TECH offers the possibility of taking this program completely online. Throughout the 6 months of training, you will be able to access all the contents of this program at any time, allowing you to self-manage your study time.

A unique, key, and decisive educational experience to boost your professional development and make the definitive leap.

Module 1. The Economic Environment and Financial Markets

1.1. Fundamentals of Banking and Finance 1.1.1. Fundamentals of Banking and Finance 1.1.2. Fundamental Variables in Financial Decisions 1.1.3. Financial Activity 1.1.4. Banking Within the Financial System 1.1.5. The Banking Business	1.2. Finance Theory 1.2.1. Statistics Applied to the Stock Market 1.2.2. Mathematics of Financial Operations 1.2.3. Financial Transactions	1.3. Macroeconomics and Monetary Policy 1.3.1. GDP 1.3.2. Financial Balance 1.3.3. The Role of the Public Sector 1.3.4. Monetary Policy and Fiscal Policy	1.4. Measuring Financial Activity 1.4.1. Financial System 1.4.2. Types of Transactions 1.4.3. Financial Instruments
1.5. Main Financial Aggregates 1.5.1. Financial Institutions 1.5.2. Financial Versus Non-Financial Investment 1.5.3. Negotiation Levels	1.6. Markets and the Control of Financial Flows 1.6.1. Structure of the Financial System 1.6.2. Financial Markets 1.6.3. Nature and Objectives of Monetary Policy 1.6.4. Interest Rates	1.7. Bank Accounting 1.7.1. Financial Statements in Banking 1.7.2. Other Balance Sheet and Income Statement Items 1.7.3. Credit Risk and Insolvency 1.7.4. Business Combinations and Consolidation	1.8. The Current Financial Crisis 1.8.1. Failures of the International Financial System 1.8.2. Accounting Standards and Creative Accounting 1.8.3. Bad Banking Practices 1.8.4. Tax Havens

Module 2. Financial Products and Banking Asset Products

2.1. Public Fixed Income Assets 2.1.1. Treasury Bills 2.1.2. Government Bonds and Debentures 2.1.3. Debt of the Autonomous Community and Other Public Entities	2.2. Equity Assets 2.2.1. The Regulation of Equity Markets 2.2.2. Companies in the Stock Market 2.2.3. Stock Market Information	2.3. Derivative Financial Products 2.3.1. Short-Term Derivative Products 2.3.2. Options 2.3.3. Swaps 2.3.4. Credit Derivatives	2.4. Structured Financial Products 2.4.1. Structured Interest Rate Swaps 2.4.2. Structured Exchange Rate 2.4.3. Structured Equity Securities 2.4.4. "Commodities" Structures
2.5. Bank Loans to Individuals 2.5.1. Analysis of Effective Rates 2.5.2. Financial Characteristics 2.5.3. Legal Characteristics	2.6. Corporate Banking Asset Products 2.6.1. Bank Discount 2.6.2. Credit Policies 2.6.3. Credit Anticipations	2.7. Mortgage Loans 2.7.1. Appraisals 2.7.2. Mortgage Subrogation 2.7.3. Mortgage Novations	2.8. Working Capital Financing Products 2.8.1. Factoring 2.8.2. Confirming
2.9. Insurance Products 2.9.1. Models and Characteristics 2.9.2. Regulation and Tax Treatment of Pension Funds and Plans 2.9.3. Marketing of Insurance Products from Credit Institutions	2.10. Liability Products 2.10.1. Remuneration and Profitability 2.10.2. APR 2.10.3. Legal and Tax Aspects 2.10.4. Target Audience		

Module 3. Collective Investment
3.1. Investment Funds

- 3.1.1. Manager and Depository
- 3.1.2. Investment Funds
- 3.1.3. Supervision
- 3.1.4. Characteristics of the Funds

3.2. Equity Management

- 3.2.1. Analysis of Investment Funds
- 3.2.2. Equity Management Tools
- 3.2.3. Analysis of a Portfolio of Financial Assets
- 3.2.4. Reinstatement of Truncated Financial Investments

3.3. Asset Allocation

- 3.3.1. Portfolio Advisory Process
- 3.3.2. Strategic and Tactical Asset Allocation
- 3.3.3. Institutional Manager
- 3.3.4. Strategic Portfolio and Tactical Portfolio

3.4. Portfolio Building

- 3.4.1. Market Risk
- 3.4.2. International Investment
- 3.4.3. Asset Classes, Utility Curves and CAMP
- 3.4.4. Portfolio Formation Strategies

3.5. Equity Management Strategies

- 3.5.1. Markowitz Portfolio Selection Theory
- 3.5.2. Systematic and Specific Risks
- 3.5.3. Financial Crisis Management
- 3.5.4. Portfolio Management in Emerging Markets

3.6. Fixed Income Management Strategies

- 3.6.1. Fixed Income Portfolio Management
- 3.6.2. Hedging in Fixed Income Portfolios
- 3.6.3. Securitizations

3.7. Insurance

- 3.7.1. Fundamentals of the Insurance Activity
- 3.7.2. Unit Linked, Coinsurance and Reinsurance
- 3.7.3. Insurance Sector Institutions
- 3.7.4. Insurance Companies and Mutual Insurance Companies

3.8. Taxation

- 3.8.1. Taxation of Financial Products
- 3.8.2. Taxation of Social Security Products
- 3.8.3. Spanish Tax Framework

Module 4. Financial Marketing
4.1. Bank Office Market Research

- 4.1.1. Specific Aspects of Financial Services Marketing
- 4.1.2. Determining Factors When Choosing a Bank
- 4.1.3. Development of New Banking Products and Services
- 4.1.4. Tools for Bank Marketing Research

4.2. Sales and Communication Techniques

- 4.2.1. Notions of Psychology Applied to Sales
- 4.2.2. Techniques to Improve Verbal and Non-Verbal Communication
- 4.2.3. Negotiation Tactics
- 4.2.4. Closing and Customer Commitment

4.3. Financial Marketing Plan

- 4.3.1. Pricing of Banking Products
- 4.3.2. Product Promotion and Advertising Campaigns
- 4.3.3. Distribution Systems Used in Financial Services Marketing
- 4.3.4. Segmentation, Targeting, and Positioning

4.4. New Strategies for Sales Growth and Cost Savings

- 4.4.1. Electronic Banking
- 4.4.2. CRM (Customer Relationship Management)
- 4.4.3. Cross-Selling and Up-Selling

4.5. Relationship Marketing

- 4.5.1. Customer Development and Loyalty
- 4.5.2. Marketing Tools for Customer Loyalty and Retention
- 4.5.3. Customer Retention Strategies

4.6. Inbound Marketing in the Banking Sector

- 4.6.1. Effective Inbound Marketing
- 4.6.2. The Benefits of Inbound Marketing
- 4.6.3. Measuring the Success of Inbound Marketing

4.7. Developing E-mail Campaigns

- 4.7.1. Designing E-Mail Marketing Campaigns
- 4.7.2. E-mail Marketing
- 4.7.3. Lists of Subscribers, Leads, and Customers

4.8. Corporate Branding

- 4.8.1. Brand Evolution
- 4.8.2. Creating and Developing a Successful Brand
- 4.8.3. Brand Equity

06

Methodology

This training program offers a different way of learning. Our methodology uses a cyclical learning approach: **Relearning**.

This teaching system is used, for example, in the most prestigious medical schools in the world, and major publications such as the **New England Journal of Medicine** have considered it to be one of the most effective.





“

Discover Relearning, a system that abandons conventional linear learning, to take you through cyclical teaching systems: a way of learning that has proven to be extremely effective, especially in subjects that require memorization"

At TECH Business School we use the Harvard case method

Our program offers a revolutionary method of skills and knowledge development. Our goal is to strengthen skills in a changing, competitive, and highly demanding environment.

“

At TECH, you will experience a way of learning that is shaking the foundations of traditional universities around the world"



We are the first online university to combine Harvard Business School case studies with a 100% online learning system based on repetition.



A learning method that is different and innovative

This intensive program from TECH Technological University School of Business prepares students to face all the challenges in this area, both nationally and internationally. We are committed to promoting personal and professional growth, the best way to strive for success, that is why TECH uses Harvard case studies, with which we have a strategic agreement that allows us to provide our students with material from the best university the world.

“ *You will learn, through collaborative activities and real cases, how to solve complex situations in real business environments”*

The case method has been the most widely used learning system among the world's leading business schools for as long as they have existed. The case method was developed in 1912 so that law students would not only learn the law based on theoretical content. It consisted of presenting students with real-life, complex situations for them to make informed decisions and value judgments on how to resolve them. In 1924, Harvard adopted it as a standard teaching method.

What should a professional do in a given situation? This is the question we face in the case method, an action-oriented learning method. Throughout the program, the studies will be presented with multiple real cases. They must integrate all their knowledge, research, argue and defend their ideas and decisions.

Our program prepares you to face new challenges in uncertain environments and achieve success in your career.

Relearning Methodology

Our university is the first in the world to combine Harvard University case studies with a 100% online learning system based on repetition, which combines different teaching elements in each lesson.

We enhance Harvard case studies with the best 100% online teaching method: Relearning.

Our online system will allow you to organize your time and learning pace, adapting it to your schedule. You will be able to access the contents from any device with an internet connection.

At TECH you will learn using a cutting-edge methodology designed to train the executives of the future. This method, at the forefront of international teaching, is called Relearning.

Our online business school is the only one in the world licensed to incorporate this successful method. In 2019, we managed to improve our students' overall satisfaction levels (teaching quality, quality of materials, course structure, objectives...) based on the best online university indicators.



In our program, learning is not a linear process, but rather a spiral (learn, unlearn, forget, and re-learn). Therefore, we combine each of these elements concentrically.

With this methodology we have trained more than 650,000 university graduates with unprecedented success in fields as diverse as biochemistry, genetics, surgery, international law, management skills, sports science, philosophy, law, engineering, journalism, history, markets, and financial instruments. All this in a highly demanding environment, where the students have a strong socio-economic profile and an average age of 43.5 years.

Relearning will allow you to learn with less effort and better performance, involving you more in your specialization, developing a critical mindset, defending arguments, and contrasting opinions: a direct equation to success.

From the latest scientific evidence in the field of neuroscience, not only do we know how to organize information, ideas, images and memories, but we know that the place and context where we have learned something is fundamental for us to be able to remember it and store it in the hippocampus, to retain it in our long-term memory.

In this way, and in what is called neurocognitive context-dependent e-learning, the different elements in our program are connected to the context where the individual carries out their professional activity.



This program offers the best educational material, prepared with professionals in mind:



Study Material

All teaching material is produced by the specialists who teach the course, specifically for the course, so that the teaching content is highly specific and precise.

These contents are then applied to the audiovisual format, to create the TECH online working method. All this, with the latest techniques that offer high quality pieces in each and every one of the materials that are made available to the student.



Classes

There is scientific evidence suggesting that observing third-party experts can be useful.

Learning from an Expert strengthens knowledge and memory, and generates confidence in future difficult decisions.



Management Skills Exercises

They will carry out activities to develop specific executive competencies in each thematic area. Practices and dynamics to acquire and develop the skills and abilities that a high-level manager needs to develop in the context of the globalization we live in.



Additional Reading

Recent articles, consensus documents and international guidelines, among others. In TECH's virtual library, students will have access to everything they need to complete their course.





Case Studies

They will complete a selection of the best business cases used at Harvard Business School. Cases that are presented, analyzed, and supervised by the best senior management specialists in Latin America.



Interactive Summaries

The TECH team presents the contents attractively and dynamically in multimedia lessons that include audio, videos, images, diagrams, and concept maps in order to reinforce knowledge.

This exclusive multimedia content presentation training Exclusive system was awarded by Microsoft as a "European Success Story".



Testing & Retesting

We periodically evaluate and re-evaluate students' knowledge throughout the program, through assessment and self-assessment activities and exercises: so that they can see how they are achieving your goals.



07

Our Students' Profiles

Most of the students who decide to pursue this program have a previous career in Marketing or Finance, although the program is also suitable for all kinds of entrepreneurs who want to start their financial project with all possible marketing guarantees. This is an excellent networking opportunity for anyone looking for potential suppliers, customers or even business partners.





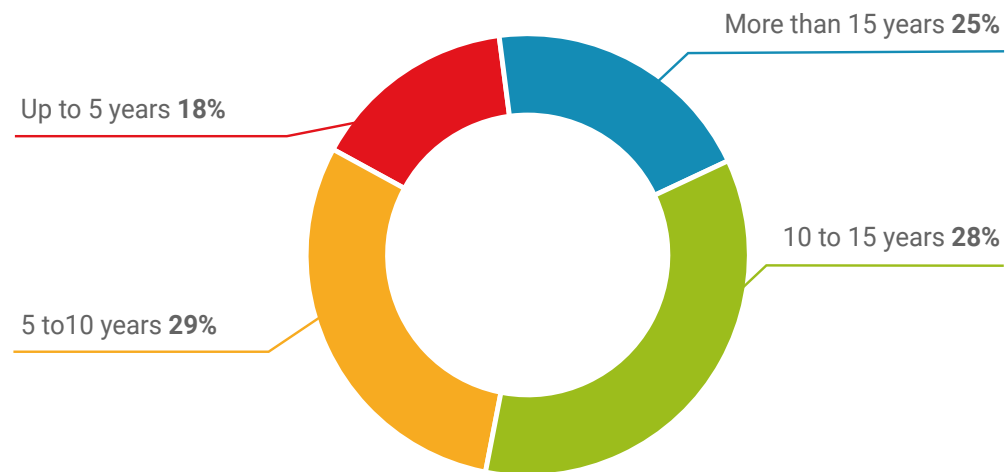
“

Your experience is key, but the professional knowledge acquired in this program will take you to new economic heights of greater prestige"

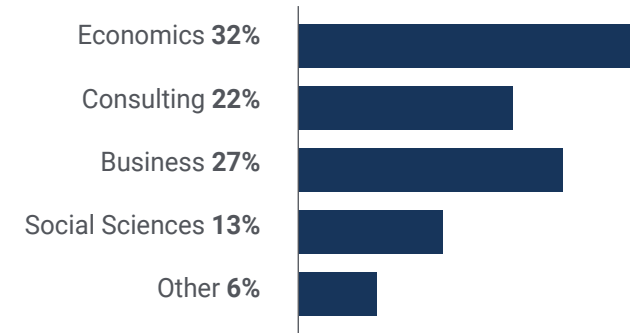
Average Age

Between **35** and **45** years old

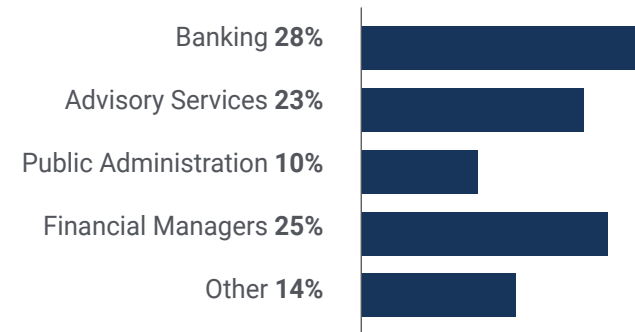
Years of Experience



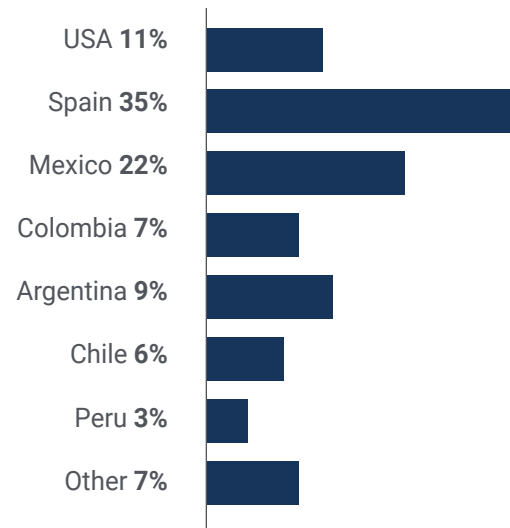
Training



Academic Profile



Geographical Distribution



Paula Ramos

Financial Manager

"I knew that I wanted to specialize in the financial field, but I wasn't sure in which branch to do so. Fortunately, I made no mistake in choosing this TECH Postgraduate Diploma, which gave me the necessary marketing keys to successfully opt for my current position as financial director"

08

Course Management

In our university we have professionals specialized in each area of knowledge, who pour their work experience into our training programs. A multidisciplinary team with recognized prestige that has come together to offer you all their knowledge in this area.



“

Our teaching team of the Postgraduate Diploma in Financial Marketing will help you achieve success in your profession"

Management



Mr. Domingo Folgado, Javier

- ♦ Head of the Department of Corporate Development & Investor Relations. WHITE Investing. Valencia Since 2018
- ♦ Founding Member of Relianze Valencia Since 2014
- ♦ Degree in Economics and Business Sciences, with a major in Finance and Investments University of Economics and Business Sciences Valencia 1995
- ♦ Master's Degree in Portfolio Management. Institute of Advanced Finance Madrid. 1999
- ♦ Specialist Postgraduate Certificate Financial and Economic Management Pontific University of Comillas ICADE Madrid. 1996
- ♦ Training in Market Risk Control (VaR) and Credit Risk (Credit Derivatives). Options & Futures Institute. 2000
- ♦ Training in Corporate Finance Applied Finances Institute (AFI) Madrid. 2000
- ♦ Professor of different finance schools in Spain For 20 years



09

Impact on Your Career

The effort made by students to pursue this qualification should translate into a satisfactory and comprehensive experience for their career. Therefore, TECH staff is fully committed to ensuring that students obtain the necessary knowledge in Financial Marketing that will help them to raise their professional level and achieve the prestige and recognition they deserve.



“

Be the new point of reference in the Financial Marketing sector. That is the objective that TECH has for you in your professional career”

Are you ready to take the leap? Excellent professional development awaits you

The Postgraduate Diploma in Financial Marketing at TECH Technological University is an intensive program that prepares students for the most exciting challenges of the business world in financial marketing. Thus, the student will graduate prepared to face the highest level of management of any financial company they wish.

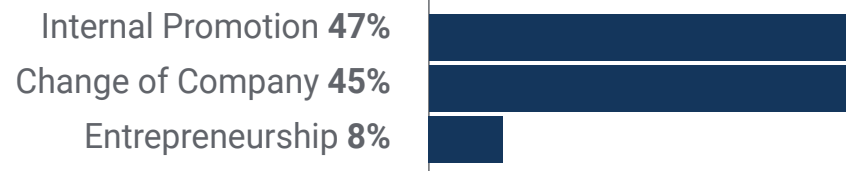
Don't miss the opportunity to train with us and you will find the career boost you were looking for.

If you want to make a positive change in your profession, the Postgraduate Diploma in Financial Marketing will help you achieve it.

When the change occurs



Type of change



Salary increase

This program represents a salary increase of more than **25%** for our students.



10

Benefits for Your Company

This Postgraduate Diploma is the best option for financial businesses to notably improve the results of their marketing department. Benefiting from the professional experience of the teachers and the innovative methodology used, they will be able to obtain very high profitability by incorporating recent graduates of this program in the most relevant positions of their Marketing departments.





“

You will bring about relevant changes in Financial Marketing thanks to the innovative perspective that this program brings you"

Developing and retaining talent in companies is the best long-term investment.

01

Intellectual Capital and Talent Growth

The executive will introduce the company to new concepts, strategies, and perspectives that can bring about significant changes in the organization.

02

Retaining high-potential executives to avoid talent drain

This program strengthens the link between the company and the executive and opens new avenues for professional growth within the company.

03

Building Agents of Change

The manager will be able to make decisions in times of uncertainty and crisis, helping the organization overcome obstacles.

04

Increased International Expansion Possibilities

Thanks to this program, the company will come into contact with the main markets in the world economy.



05

Project Development

The manager can work on a current project or develop new projects in the field of R&D or Business Development within their company.

06

Increased Competitiveness

This program will equip students with the skills to take on new challenges and drive the organization.

11

Certificate

The Postgraduate Diploma in the Financial Marketing guarantees, in addition to the most rigorous and updated training, access to a Postgraduate Diploma issued by TECH Technological University.



“

*Successfully complete this training program
and receive your university certificate without
travel or laborious paperwork”*

This **Postgraduate Diploma in Financial Marketing** contains the most complete and updated program on the market.

After the student has passed the evaluations, they will receive their corresponding **Postgraduate Diploma** issued by **TECH Technological University** by tracked delivery*.

The diploma issued by **TECH Technological University** will reflect the qualification obtained in the Postgraduate Diploma, and it meets the requirements commonly demanded by labor exchanges, competitive examinations, and professional career evaluation committees.

Title: **Postgraduate Diploma in Financial Marketing**

Official N° of Hours: **375 h.**



*Apostille Convention. In the event that the student wishes to have their paper diploma issued with an apostille, TECH EDUCATION will make the necessary arrangements to obtain it, at an additional cost.



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- » Dedication: **16h/week**
- » Schedule: **at your own pace**
- » Exams: **online**

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