

Contents

Unit	Investment communication skills	Reading	Listening	Language
01 Financial products	Advising and warning investors Confirming a telephone call by email Discussing and recommending an investment	A banking services web page An email chain following up a request for information	A radio phone-in show A telephone call discussing retirement planning	Common financial terms Phrases for giving advice and warnings Phrases to ask for and check information politely
02 Market analysis	Discussing market developments and the effect on a portfolio Asking for and giving suggestions on how to respond to market shocks	A blog post about the efficient market hypothesis Financial news stories A blog post about market downturns	A conference call about managing an investment fund A meeting discussing how to react to market developments	Market analysis expressions Types of financial shock <i>Suggest</i> and <i>recommend</i> Expressions to describe investor behaviour
Video	Interviews with investment professionals talking about financial products and market analysis			
Review	Revision exercises for Units 1 and 2			
03 Asset management	Discussing the potential outcome of investment decisions Talking about the progress of a decision by email	A blog post about diversification Emails about developing a new fund An agenda on the structure of an investment fund	Meetings discussing the asset mix of a portfolio A meeting discussing the asset mix of a fund	Types of asset class Collocations with <i>returns</i> and <i>market(s)</i> First and second conditionals for giving advice Common meeting expressions
04 Dealing with clients	Generating interest from a potential customer Discussing price movements and recommending action	A blog post about cold calling Analysts' reports	A cold call between a broker and a potential customer Phone calls discussing price movements in different securities	Phrases for describing the performance and potential of a security Listening to and giving opinions <i>Will</i> for predictions Verbs for describing a trend
Video	Interviews with investment professionals talking about asset management and dealing with clients			
Review	Revision exercises for Units 3 and 4			
05 Risk management	Persuading people to change the makeup of a portfolio Talking about benefits and risks of a credit decision	A blog post about how to manage risk A loan application An email about a loan application	A discussion about changes in the risk profile of a portfolio Meetings to persuade someone to make changes to a portfolio A meeting discussing a loan application	Collocations with <i>risk</i> Modal verbs Company performance Linking words
06 Compliance	Chasing up a request Explaining rules and regulations	An email giving information about regulatory changes A text giving advice on how to get people to do things	A phone call chasing up paperwork Phone calls discussing compliance issues	Phrases to discuss compliance issues Common email expressions Phrases to chase people up Phrases to discuss market abuse Phrases to give advice about compliance
Video	Interviews with investment professionals talking about risk management and compliance			
Review	Revision exercises for Units 5 and 6			
07 Initial public offering	Negotiating an IPO deal An IPO presentation	A blog post about the IPO beauty parade Summaries of two banks' IPO offers Financial data on slides	A negotiation about a bank's IPO fees A presentation of a company's background A presentation of a company's finances	IPO terms Negotiating expressions Presentation expressions
08 Mergers & acquisitions	Negotiating a merger Negotiating a transition services agreement	Company profiles Emails discussing the valuation of a merger	A negotiation about the details of a merger A meeting discussing a transition services agreement	Company valuation terms Negotiation expressions Word order for emphasis Contract and legal terms
Video	Interviews with investment professionals talking about initial public offerings and mergers & acquisitions			
Review	Revision exercises for Units 7 and 8			