# Training Course on Robo-Advisory and Automated Retirement Planning Platforms

Professional Development Training Course Outline

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| **Category** | Pension and Retirement | **Duration** | 10 Days |
| **Base Fee** | $3,000 USD | **Delivery Mode** | Online / On-site Hybrid |

## Course Introduction

Training Course on Robo-Advisory and Automated Retirement Planning Platforms is designed to equip financial professionals with the knowledge and skills necessary to leverage technology in providing retirement planning services. As the demand for accessible, efficient, and cost-effective financial advice grows, robo-advisory platforms and automated planning tools have emerged as transformative solutions in the financial services industry. This course focuses on the principles of robo-advisory, the functionality of automated platforms, and their implications for retirement planning. Participants will explore key topics such as the mechanics of robo-advisory services, asset allocation strategies, client engagement through technology, and the regulatory landscape surrounding automated advice. The curriculum integrates theoretical concepts with practical applications, featuring case studies, interactive exercises, and real-world scenarios that illustrate successful implementations of robo-advisory in retirement planning. By the end of the training, participants will be well-equipped to implement and manage robo-advisory services that enhance client outcomes and operational efficiency. The course will also address the challenges of integrating robo-advisory solutions, including technology adoption, client trust, and compliance issues. Participants will gain insights into effectively communicating the value of automated services to clients, ensuring they understand the benefits and limitations of robo-advisory platforms.

## Programme Curriculum

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**Course Objectives**

1. Understand the fundamentals of robo-advisory and automated retirement planning.
2. Analyze the mechanics of robo-advisory platforms and their functionalities.
3. Evaluate asset allocation strategies used in automated planning.
4. Explore client engagement techniques through technology.
5. Discuss the regulatory landscape affecting robo-advisory services.
6. Develop skills in implementing and managing robo-advisory solutions.
7. Assess the challenges and risks associated with automated advice.
8. Foster effective communication strategies for engaging clients.
9. Create actionable plans for integrating robo-advisory into practice.
10. Stay informed about emerging trends in technology and financial services.
11. Measure the effectiveness of robo-advisory initiatives in retirement planning.
12. Identify tools and technologies that support automated planning.
13. Prepare for the future of retirement planning in an automated environment.

**Target Audience**

1. Financial advisors and planners
2. Wealth management professionals
3. Retirement specialists
4. Compliance officers
5. IT professionals in financial services
6. Data analysts and technology specialists
7. Graduate students in finance or technology management
8. Policy makers in financial regulation

**Course Duration: 10 Days**

**Course Modules**

**Module 1: Introduction to Robo-Advisory**

- Define robo-advisory and its relevance in financial services.
- Explore the history and evolution of robo-advisors.
- Discuss the key components of robo-advisory platforms.

- Identify the benefits of using robo-advisory services for retirement planning.
- Review case studies illustrating successful robo-advisory implementations.

**Module 2: Mechanics of Robo-Advisory Platforms**

- Analyze how robo-advisory platforms operate and deliver services.
- Discuss client onboarding processes and risk assessments.
- Explore asset allocation algorithms used in automated planning.
- Identify key technologies that underpin robo-advisory solutions.
- Review real-world examples of effective platform functionalities.

**Module 3: Asset Allocation Strategies**

- Overview of asset allocation principles in retirement planning.
- Discuss the role of diversification in portfolio management.
- Evaluate different asset allocation models used by robo-advisors.
- Analyze the impact of market conditions on asset allocation strategies.
- Review case studies of successful asset allocation in automated platforms.

**Module 4: Client Engagement Through Technology**

- Importance of client engagement in the robo-advisory model.
- Discuss strategies for enhancing client interactions through technology.
- Explore the use of digital communication tools and platforms.
- Identify best practices for building trust and rapport with clients.
- Review real-world examples of effective client engagement strategies.

**Module 5: Regulatory Landscape for Robo-Advisory**

- Understand the regulatory environment affecting robo-advisory services.
- Discuss compliance requirements and responsibilities for providers.
- Explore the impact of regulations on client protection and transparency.
- Analyze case studies of regulatory challenges faced by robo-advisors.
- Identify best practices for ensuring compliance in automated services.

**Module 6: Implementing Robo-Advisory Solutions**

- Outline steps for integrating robo-advisory into financial practices.
- Discuss the importance of stakeholder engagement during implementation.
- Identify best practices for training staff on new technologies.
- Explore strategies for ensuring data security and privacy.
- Review real-world examples of successful implementation processes.

**Module 7: Challenges and Risks of Automated Advice**

- Identify common challenges associated with robo-advisory adoption.
- Discuss client trust and perception issues in automated services.
- Explore technological risks and data security concerns.
- Analyze the implications of market volatility on automated advice.
- Review case studies of organizations facing challenges in implementation.

**Module 8: Communicating the Value of Robo-Advisory**

- Importance of clear communication regarding robo-advisory services.
- Techniques for educating clients about automated planning benefits.
- Developing marketing strategies to promote robo-advisory offerings.
- Best practices for addressing client concerns and questions.
- Review real-world examples of effective communication strategies.

**Module 9: Creating Actionable Plans for Integration**

- Steps for developing a strategic plan for robo-advisory integration.
- Engaging stakeholders in the planning process.
- Techniques for setting measurable objectives and timelines.
- Identify tools for tracking progress and evaluating success.
- Review case studies of actionable plans in practice.

**Module 10: Emerging Trends in Robo-Advisory**

- Overview of current trends shaping the future of robo-advisory.
- Discuss innovations in technology that enhance automated planning.
- Evaluate the impact of regulatory changes on robo-advisory services.
- Explore the potential of artificial intelligence in enhancing robo-advisory.
- Analyze real-world examples of organizations adapting to trends.

**Module 11: Measuring the Effectiveness of Robo-Advisory Initiatives**

- Techniques for evaluating the success of robo-advisory implementations.
- Identifying key performance indicators (KPIs) for automated services.
- Discuss methods for gathering client feedback on robo-advisory experiences.
- Review real-world examples of assessments and outcomes.
- Tools for monitoring the impact of robo-advisory on client satisfaction.

**Module 12: Tools and Technologies for Automated Planning**

- Overview of tools and platforms available for robo-advisory services.
- Evaluating software solutions that support automated retirement planning.
- Discuss the role of cloud computing in enhancing robo-advisory capabilities.
- Identify emerging technologies that can improve client engagement.
- Review case studies of effective technology use in robo-advisory.

**Training Methodology**

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.
- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.
- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.
- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

**Register as a group from 3 participants for a Discount**

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

**Certification**

Upon successful completion of this training, participants will be issued with a globally recognized certificate.

**Tailor-Made Course**

We also offer tailor-made courses based on your needs.

**Key Notes**

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.
- One-year post-training support, consultation, and coaching provided after the course.
- Payment should be made at least a week before the training commencement to Fineskill Training Center account, as indicated in the invoice, to enable better preparation.

## Upcoming Scheduled Sessions

| Start Date | End Date | Location | Price |
|---|---|---|---|
| **23 Nov 2026** | 04 Dec 2026 | Online | $2,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $3,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $6,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $6,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $12,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $9,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $12,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $12,000 |

Ready to enroll or request a customized program? Book online or contact us:

**Register Online Now**