



FIGARO - An Overview

About the course

This course has been designed for anyone wishing to gain an understanding of the scope and functionality of the Figaro stock broking and settlement system.

Course Objectives

On completion of this course delegates will have a better understanding of the operations and end-to-end processes of the individual components that form the integrated Figaro solution.

Who should attend the course?

- Anyone wishing to gain a better understanding of the functionality of the Figaro solution, and an awareness of the capabilities of the system.
- It is suitable for both new and existing users.

Course Prerequisites

- Delegates should have basic knowledge of MS Windows.

Course Content

Part 1: Back Office

Accounts, Client Database, Contracts, Market Settlement, Nominee/Stock Reconciliation, Corporate Actions, Dividends, Valuations, ISAs/Tax Wrappers, CGT, Management Charges, Compliance, Reporting

Part 2: Front Office

Client Details, Withdrawals, Valuation, Reverse Portfolio, Performance Analysis, Modelling, CGT, Pack Print, Statements, Record Card, CRM, Document Generation, Links to Excel, Word & Mail

Course Details

- Duration: 1 Day
- Course booking reference: **FIGAROmFOL**

Course Venues

Courses can be held at our fully equipped training facilities in London, Birmingham or Newcastle, or delivered on Client site.

- JHC Plc, Ground Floor West, Cottons Centre, Cottons Lane, London SE1 2QG

Contacting JHC Plc

For information on booking this course please contact our training department:

- Ph. 0207 367 6482
- Email: training@jhc.co.uk

