

Growing your Own Assets and Revenues: Portfolio Career, Business Ventures and Investments – a Private Journey

Markos Daskalakis

JULY 10, 2020

9:00-16:15

CPE's: **7**



Course Objectives

This seminar aims to convey the principles, methods and tools necessary to build a private portfolio of asset holdings and revenue sources. The delivery method will go beyond the “theory” on the presentation deck and seek to spark constructive conversations with/within the Audience, so that examples, ideas and potential approaches can be discussed real-time.

Participants will be able to:

- Identify and manage biases, prejudice and preconceptions with regards to wealth and the process of accumulating it
- Enhance understanding and utilisation of the Risk vs Reward relationship
- Proceduralize their thinking (e.g. by learning from their mistakes) and industrialize their approach
- Build foundations towards a financially independent life
- Build their own
 1. **Private Financial Statements** using an advanced, practical template
 2. **Business Plan** using a structured, real-life template that is meaningful to potential investors (MS Excel templates will be provided in advance of the Seminar)



Who should attend?

Anyone interested in growing their assets and revenues



Course description

1. Introduction

2. Risk and Wealth

- 2.1. Risk in the Business World
- 2.2. Measuring Growth
- 2.3. The Importance of Liquidity

3. Ethics & Trust

4. Your own Small / Medium Enterprise

- 4.1. Basic questions before Starting Up / Partnering
- 4.2. Three Highways to Bankruptcy
- 4.3. Bureaucracy vs Flexibility
- 4.4. Keeping Records of your Activities

5. Effective Delegation

6. Reducing your Cost of Capital

7. Diversifying your Portfolio

- 7.1. Revenue Classes
- 7.2. Asset Classes
- 7.3. The sectors of the Economy
- 7.4. Business Valuations

8. Your Financial Statements

- 8.1. Statement of Financial Position
- 8.2. Statement of Comprehensive Income

9. Closing thoughts



Curriculum vitae

Markos Daskalakis brings more than two decades of continuous professional experience, 19 years of which in Global Dow 150 financial institutions (in all 3 lines of defence) and Deloitte, across 3 continents.



He has operated at the Board and Audit Committee level contributing industry expert ideas, shaping strategic decisions, converting them to tactical plans and driving these efficiently to implementation

Key features of his career include:

1. creating, reshaping and re-tooling large Internal Audit functions, formulating & deploying Internal Audit Methodologies that comply with global standards and best practices
2. leading/facilitating the delivery of complex, multi-jurisdictional operational and financial restructuring projects

Concurrently, Markos pursues an academic career as a freelance lecturer in Audit, Assurance, Business and Finance-related professional qualifications such as ACCA, CISA, CIA and DipIFR in EMEA, bespoke courses and coaching for Executives with more than 3,500hrs of classroom experience

He is a Certified Information Systems Auditor (ISACA-CISA), a Certified Internal Auditor (IIA-CIA), an Associate Chartered Accountant (ICAEW-ACA) and a member of the Technical Chamber of Greece. He earned a Master's Degree in Civil and Environmental Engineering from Imperial College, London

Today, Markos lives in London and works as an Internal Audit Chief Operating Officer in one of the world's largest Financial Institutions that employs circa 260,000 people and has Total Assets of circa USD2.7 trillion.



Price

€ 250

€ 180 (members
IIA Greece)



Venue

virtual seminar via
tele-conference