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The **Italian Association of Investment Consultants (Assoconsulenza)** - was established in December 1996 in close collaboration and with the approval of the economic ministries, supervisory authorities of securities markets, financial operators and academic institutions and research, not has a profit, you can join both the individuals that legal persons having the necessary requirements of integrity and professionalism.

### **Activities:**

#### **- Internal Activities:**

- publication of a newsletter communication to members;
- regular meetings between members;
- establishing a commission to study and research on organizational issues;
- refresher courses and technical skills.

#### **- External Activities:**

- publishing;
- educational activity;
- ethical investments and standards of professional conduct;
- quantitative methods and mathematical-statistical analysis;
- political economy and economic policy;
- accounting, budgets and financial analysis;
- instruments and financial markets (domestic and global);
- theory of valuation of investments;
- analysis of investment or debt securities;

- equity investment analysis;
- analysis or other investment instruments (derivatives, commodities, real estate ...);
- corporate planning, investment and taxation (national and international)
  
- **International Activities:**
  - Twinning and partnership working with similar groups and / or international institutions present in major financial markets with particular reference to the following geographical areas: United States, Britain, France, Germany, Switzerland, Sweden, Norway, South Africa, Japan.
  
  - direct participation in committees for study and research promoted by organizations and / or international institutions on operational aspects, economic, legal and vocational training;
  
  - organization of international conferences which time a meeting of operators affiliated to various institutions and / or associations for the discussion of issues of common interest to business meetings and development of coordinated initiatives.

### **Services:**

- Regulate, facilitate and develop the practice as an investment advisor;
- Treat skills and raise awareness among the public of the profession and the role of investment advisor;
- Institutionalize and shape the profession of investment consultant through the establishment of a special order and roll professional self-regulation;
- Promote the study and analysis of the securities market, its instruments, its laws, its functions and implications;
- Represent the interests of members at the institutional and legislative;
- Contribute to the development of good, popular and efficient financial literacy in the country;
- Conduct research, training, support, conferences, publishing, cultural, social, within the professional sector;
- Facilitating the exchange, knowledge and personal and professional relationships among partners;
- Become a focal point of reference super-partes in analysis, certifications, assessments, rating against companies, individuals, institutions, public administrations.