

# Client Acquisition Strategies for Wealth Managers & Private Bankers

1 Day

## LEVEL

Intermediate

## COURSE CONTENT

### Private Banking Essentials

#### 6 Key Components of Private Banking services

- Tailored services
- Needs Anticipation
- Personal Contact
- Evidential Discretion & Prudence
- Investment Performance
- Long-term Relationship

### How Personalized Wealth Management Marketing Strategies Are Facing Winds of Change

### A Case Study – How ‘Life Choices’ Are Affecting Private Banking?

### Clients Acquisition, Retention & Extension

#### Acquisition

- Sources of Prospective Clients
- Organizational versus marketing options
- Acquisition Map

#### Retention

- 2 faces of ‘Trust’ Banking
- Creating Loyalty where it matters

#### Extension

- Client Segmentation
- Segmentation & Referral

### Private Bankers’ Personal View

#### A Value Profile on Self

- Traditionalist
- In-betweener
- Challenger
- Synthesizer

How Does My Value Affect My Clients?

Developing Adaptive Strategies in Building Lasting Relationship with Clients

More Value-Addedness in Customer life-cycle.

Feedback & Questions

Action Planning