

MBA in Wealth Management

4 Days

COURSE OVERVIEW

In 2011, providing valuable **trusted professional advice** is now back to the forefront of the winning private banking model!

Global market turbulence has skewed private client asset allocations toward the safety of cash, government bonds and low-risk products. As a result, returns on client portfolios have suffered. And across the world, private clients have lost confidence in existing relationships with their relationship managers and many are **switching their relationship banks and moving assets**.

When confidence returns, clients will begin to strive for higher growth. **A wall of private client money will begin to search for opportunities in higher-yielding asset classes**. These clients will seek out accomplished and professional relationship managers who are best able to manage their wealth and exceed expectations!

LEVEL

Managerial

WHAT WILL I GET OUT OF IT?

This 4 day Executive Program will help you enhance your skills in the following key areas:

- Analyze your private banking business – from both the SOFT and HARD side!
- Prospect for the right clients who'll provide you with sustained growth in AUM and revenue
- Strengthen your asset allocation and portfolio management
- Identify credit opportunities to increase client retention and revenue
- Implement technology to increase your productivity
- Review relationship performance using simple tools and metrics
- Rate your clients, organization and yourself on an "effective success scale"

WHO'S IT FOR?

- Senior Relationship Managers & Advisors
- Heads of Private Banks and Wealth Management
- Heads of Financial Intermediaries
- Head of Strategy & Business Development
- Head of Product, Marketing & Sales
- Head of Training & Development (Wealth Management)
- Family Offices

COURSE CONTENT

Market Dynamics

- The global wealth landscape and drivers
- Regional Private Banking market

Client Management Process

- Prospecting and profiling effectively
- The portfolio management process
- Monitoring and reviewing
- Success for self and your client

Prospecting and Profiling

- HNWI demographics
- Who do I want as my client?
- Who needs me as a Relationship Manager?
- Understanding HNWI needs
- Source of their wealth
- Client personality, risk appetite and regional biases

Financial Profiling

- Behavioural aspect of HNWI clients
- Understanding greed & fear: the prime drivers of investment decisions
- What else motivate investment behaviour?
- Investment implications for the client specific to their geography

Portfolio Management Process

- Introduction to economic cycles
- Asset allocation and economic cycles
- Asset allocation for HNWI's

Asset Allocation Approaches

- Strategic and tactical asset allocation
- Factors affecting asset allocation decisions
- Matching asset allocation to investor profile

Investment Opportunities

- Equity and equity-linked structures
- Credit and credit-linked structures
- Commodity and commodity-linked structures
- Currency and currency-linked structures
- Structured products
- Alternative assets like hedge funds, private equity, real estate etc

Servicing the Credit Needs of Clients- Develop a Deeper Relationship

- The full service approach
- Identifying clients' credit needs
- Credit products and their key risks

Manager Selection

- Quantitative and qualitative approaches
- Style analysis and performance attribution
- Risk attribution

Portfolio Construction and Strategy

- Executing the asset mix as specified in the investment policy
- Developing tracking error and tolerance bands
- Blended benchmark construction for performance analysis
- Integrating non-financial and non-traditional assets into the asset allocation process
- Integrating insurance into asset allocation process
- Integrating privately-owned businesses into asset allocation process
- Core-satellite investing within portfolio context
- Active management in core-satellite investing
- Risk control mechanism for the portfolio

Monitoring Performance of the Client Relationship

- Portfolio performance
- Relationship profitability
- Quality and stable AUM growth
- De-risked, under-leveraged and diversified portfolio

Technology for Private Banking

- Building an edge during volatile times
- Technology as an enabler and key differentiator
- Strategic tool for relationship monitoring
- Model for the future

The Satisfied Client

- Increasing client family AUMs
- Increasing number of products and services
- Brand ambassador for the organization and you!

The Successful Private Banking Organization

- Key challenges faced by private banks
- Initiatives for regional success strategies
- Product sales vs. relationship management
- Brand vs. portfolio performance

The Successful Private Banker

- Identifying the traits and developing oneself into a successful private banker
- Ideal business: RM's point of view
- Ideal RM: Client's point of view
- Winning strategy for successful relationship management