QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1547

Advanced Private Banking & Wealth Management Training Course

WEALTH MANAGEMENT & PRIVATE BANKING
FINANCE, INVESTMENT & BANKING

DURATION
5 Days

DELIVERY
Classroom

Course Overview

The Advanced Private Banking & Wealth Management Training Course provides an advanced professional framework for managing sophisticated client relationships, complex investment portfolios, and comprehensive wealth strategies within private banking and wealth management environments. The course is designed to strengthen the ability of banking and financial professionals to understand complex client needs, structure appropriate wealth solutions, manage investment portfolios, assess risk, and deliver high-value advisory services to high-net-worth and ultra-high-net-worth clients.

Advanced private banking requires an integrated understanding of investment management, financial planning, credit solutions, liquidity management, risk assessment, portfolio construction, and relationship management. Clients with substantial wealth often have complex financial structures, multiple asset classes, international interests, business holdings, financing requirements, and long-term wealth preservation objectives. The course provides participants with practical frameworks for assessing these requirements and developing coordinated solutions that support both client objectives and institutional risk parameters.

The programme explores advanced approaches to portfolio management, strategic and tactical asset allocation, investment selection, alternative investments, portfolio risk, liquidity planning, and performance evaluation. It also examines how private banking professionals can integrate investment and financing solutions with broader wealth management strategies while maintaining appropriate suitability, governance, compliance, and risk management standards.

A key component of the course is the strategic management of high-value client relationships. Participants examine how to deepen client relationships through needs-based advisory, develop sophisticated value propositions, coordinate internal and external specialists, and identify opportunities to provide integrated financial solutions. Particular attention is given to client segmentation, relationship profitability, service quality, confidentiality, trust, and long-term relationship development.

Through practical case studies, portfolio exercises, client scenarios, and strategic workshops, the Advanced Private Banking & Wealth Management Training Course enables participants to connect technical financial knowledge with real-world private banking decisions. The programme supports stronger advisory capabilities, disciplined investment decision-making, effective risk management, and more strategic management of complex wealth relationships.

Objectives

- Analyze advanced private banking and wealth management principles and apply them to complex high-net-worth client scenarios during the course.
- Develop comprehensive client profiles that integrate financial objectives, investment preferences, liquidity requirements, risk characteristics, and long-term wealth priorities.
- Evaluate sophisticated investment portfolios and identify opportunities to improve diversification, asset allocation, liquidity, and risk-adjusted performance.
- Apply advanced portfolio construction principles to develop investment strategies aligned with client objectives, investment horizons, and risk tolerance.
- Design integrated wealth management solutions combining investment management, financing, liquidity, and strategic financial planning requirements.
- Assess traditional and alternative investment opportunities and determine their potential role within diversified private banking portfolios.
- Evaluate portfolio, market, concentration, liquidity, credit, operational, and relationship risks and recommend appropriate risk management responses.
- Develop advanced relationship management strategies that strengthen client engagement, advisory value, retention, and long-term relationship development.
- Apply suitability, governance, due diligence, and compliance principles when developing and presenting sophisticated private banking solutions.
- Assess client relationship opportunities by analyzing financial needs, existing relationships, potential service requirements, and broader wealth management objectives.
- Improve the evaluation of investment performance and prepare structured portfolio reviews that support informed client and investment decisions.
- Develop a comprehensive private banking and wealth management strategy for a complex client case by the end of the programme.

Who Should Attend

The Advanced Private Banking & Wealth Management Training Course is designed for experienced professionals working in private banking, wealth management, investment management, asset management, financial advisory, and premium banking services. It is particularly relevant for Private Banking Managers, Relationship Managers, Wealth Managers, Investment Advisers, Portfolio

Managers, Investment Managers, Financial Advisers, Client Advisers, and senior professionals responsible for managing high-net-worth and ultra-high-net-worth client relationships.

The course is also suitable for senior professionals working in credit and lending, treasury, investment products, portfolio advisory, risk management, compliance, client onboarding, financial planning, and wealth advisory functions. Professionals involved in structuring complex financing solutions, investment portfolios, liquidity strategies, or integrated wealth solutions can benefit from the advanced perspective provided by the programme.

Senior executives, heads of private banking, wealth management directors, investment leaders, relationship management leaders, asset management executives, and decision makers within banks and financial institutions can also benefit from the course. It is particularly relevant for professionals responsible for developing private banking strategies, managing strategic client relationships, improving advisory quality, overseeing portfolio performance, and strengthening the overall value proposition of wealth management services.

Learning Outcomes

- Analyze complex financial profiles of high-net-worth and ultra-high-net-worth clients and identify their primary wealth management requirements.
- Develop comprehensive wealth strategies that integrate investment objectives, liquidity requirements, financing needs, risk considerations, and long-term financial priorities.
- Construct diversified investment portfolios using appropriate strategic and tactical asset allocation approaches.
- Evaluate the role of equities, fixed income, cash, real estate, private markets, and other alternative investments within sophisticated client portfolios.
- Assess portfolio risks, including market, concentration, liquidity, credit, operational, and investment risks.
- Apply advanced approaches to portfolio monitoring, performance evaluation, rebalancing, and strategic review.
- Develop integrated private banking solutions that combine investment management, lending, liquidity, and wealth planning.
- Evaluate client suitability and align financial solutions with client objectives, risk tolerance, investment horizon, and financial circumstances.

- Develop strategies for managing and expanding high-value client relationships through needs-based advisory and coordinated financial solutions.
- Identify opportunities to coordinate private banking, investment management, credit, treasury, and specialist advisory services.
- Conduct structured client portfolio reviews and communicate investment strategy, performance, risks, and recommended actions effectively.
- Prepare a complete advanced private banking and wealth management strategy for a complex client using an integrated advisory approach.

Course Outline

DAY 01

Advanced Private Banking and Strategic Wealth Management

- Evolution and strategic role of private banking and wealth management
- Characteristics and financial needs of high-net-worth and ultra-high-net-worth clients
- Advanced client segmentation and relationship classification
- Comprehensive client financial profiling and needs assessment
- Identifying investment, financing, liquidity, and wealth preservation objectives
- Developing strategic wealth management frameworks
- Integrating private banking, investment, lending, and advisory services
- Building sophisticated client value propositions
- Managing confidentiality, trust, service quality, and client expectations

PRACTICAL APPLICATION

Develop a comprehensive strategic profile for a complex private banking client and identify the client’s primary financial and wealth management priorities

DAY 02

Advanced Investment Management and Portfolio Construction

- Advanced principles of investment management for private banking clients
- Strategic and tactical asset allocation

DAY 02 — CONTINUED

- Portfolio diversification and concentration management
- Equities, fixed income, cash, real estate, and alternative investments
- Private market and other sophisticated investment considerations
- Portfolio construction based on risk tolerance and investment objectives
- Liquidity requirements and portfolio constraints
- Investment selection and manager evaluation
- Portfolio rebalancing and strategic portfolio reviews
- Measuring investment performance and evaluating risk-adjusted outcomes

PRACTICAL APPLICATION

Construct and evaluate a diversified investment portfolio for a high-net-worth client with multiple investment objectives

DAY 03

Risk Management, Credit and Liquidity Solutions

- Advanced risk assessment within private banking
- Market, investment, concentration, liquidity, and credit risks
- Assessing client borrowing requirements and financing objectives
- Integrating lending solutions with broader wealth strategies
- Liquidity planning for complex client structures
- Managing short-term and long-term liquidity requirements
- Collateral considerations and financing risk
- Stress testing and scenario analysis for client portfolios
- Coordinating investment and credit decisions
- Risk controls, monitoring, escalation, and portfolio review

PRACTICAL APPLICATION

Analyze a complex client case involving investment, financing, and liquidity requirements and develop an integrated risk management strategy

DAY 04

Advanced Client Relationship Management, Suitability and Governance

- Strategic management of high-value private banking relationships
- Developing needs-based advisory approaches
- Understanding client motivations, objectives, and decision-making behaviour
- Relationship profitability and client lifetime value considerations
- Cross-functional coordination between relationship managers and specialists
- Developing sophisticated client proposals and advisory recommendations
- Suitability and appropriateness in complex wealth solutions
- Due diligence, governance, compliance, and client protection
- Managing conflicts of interest and reputational considerations
- Handling complex client conversations and investment concerns

> **PRACTICAL APPLICATION**
>
> Conduct a strategic client review and develop a coordinated advisory proposal addressing investment, financing, liquidity, and wealth management needs

DAY 05

Integrated Private Banking Strategy and Wealth Management Advisory

- Developing comprehensive private banking strategies for complex clients
- Integrating investment management, credit, liquidity, and wealth planning
- Advanced portfolio review and performance discussion
- Identifying relationship development and strategic service opportunities
- Coordinating internal specialists and external professional advisers
- Building long-term client relationship strategies
- Managing changing client objectives and market conditions
- Strengthening advisory quality and decision-making discipline
- Developing client action plans and implementation priorities

DAY 05 — CONTINUED

- Best practices for strategic private banking and wealth management

FINAL WORKSHOP

Prepare and present a comprehensive private banking and wealth management strategy for a complex client, covering client objectives, portfolio construction, asset allocation, risk management, liquidity, financing, relationship strategy, and implementation priorities

Register or Request More Information

Course page: https://quest-training.com/courses/advanced-private-banking-wealth-management-training-course
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