QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1554

Financial Planning & Wealth Management Training Course

WEALTH MANAGEMENT & PRIVATE BANKING
FINANCE, INVESTMENT & BANKING

DURATION
5 Days

DELIVERY
Classroom

LOCATION
Munich, Germany

DATES
23 – 27 Nov 2026

Scheduled Event Details

CITY	Munich, Germany
DATE	23 – 27 Nov 2026
DELIVERY TYPE	Classroom
COURSE FEE	€5,400

Course Overview

The Financial Planning & Wealth Management Training Course provides a comprehensive professional framework for developing integrated financial and wealth management strategies that support clients in achieving their financial objectives. The course focuses on connecting financial goals, cash flow management, investment planning, risk management, liquidity, wealth preservation, and long-term growth within a structured and practical planning process.

Effective financial planning provides a disciplined foundation for financial decision-making. This course examines practical approaches to assessing a client's financial position, identifying short-, medium-, and long-term objectives, evaluating income, expenditure, assets, liabilities, liquidity, and risk exposure, and translating this information into a structured financial plan. Participants learn how to develop financial strategies that can be implemented, monitored, reviewed, and adjusted as client circumstances evolve.

The programme also addresses investment strategy development, asset allocation, portfolio construction, and diversification. Participants explore the roles of equities, fixed income, cash and cash equivalents, real assets, and alternative investments within wealth management strategies. They learn how to align investment decisions with risk tolerance, investment horizon, liquidity requirements, income objectives, capital preservation priorities, and long-term wealth creation goals.

Wealth management extends beyond investment selection and requires an integrated understanding of financial risks, future obligations, liquidity requirements, and changing client objectives. Accordingly, the course covers wealth risk management, liquidity planning, liability management, scenario analysis, stress testing, portfolio performance evaluation, and portfolio rebalancing. These capabilities help professionals develop more coordinated approaches to managing wealth rather than treating individual financial decisions in isolation.

Through case studies, practical exercises, financial planning workshops, and portfolio analysis, the Financial Planning & Wealth Management Training Course enables participants to develop practical capabilities in financial assessment, objective setting, investment strategy, portfolio management, risk management, and ongoing financial review. The programme is particularly valuable for Wealth Managers, Private Bankers, Financial Advisers, Financial Planners, Investment Advisers, Portfolio Managers, Asset Management Professionals, and senior decision makers responsible for developing financial and wealth management solutions.

Objectives

- Analyze a client's overall financial position, including income, expenditure, assets, liabilities, cash flow, and liquidity during the course.
- Develop comprehensive financial and investment profiles reflecting client objectives, priorities, risk considerations, and financial constraints.
- Evaluate short-, medium-, and long-term financial objectives and translate them into structured and measurable planning priorities.
- Apply appropriate risk assessment techniques to determine client risk tolerance and risk capacity.
- Design integrated financial plans that connect cash flow management, investment planning, liquidity, and risk management.
- Evaluate major asset classes and determine their appropriate roles within client investment and wealth management strategies.
- Develop asset allocation and portfolio construction strategies aligned with client objectives and risk requirements.
- Apply diversification and risk management principles to manage market, liquidity, credit, and concentration risks.
- Assess portfolio and financial plan performance using appropriate measures and benchmarks and identify significant deviations.
- Develop practical approaches for reviewing financial plans and rebalancing portfolios when client circumstances or market conditions change.
- Apply scenario analysis and stress testing to evaluate the resilience of financial plans and investment portfolios.
- Prepare and present a comprehensive financial and wealth management plan for a client by the end of the course.

Who Should Attend

The Financial Planning & Wealth Management Training Course is designed for professionals working in wealth management, private banking, financial advisory, asset management, investment management, and financial planning. It is particularly suitable for Wealth Managers, Financial Advisers, Financial Planners, Private Bankers, Relationship Managers, Investment Advisers, Portfolio Managers, Asset Managers, Financial Analysts, Investment Analysts, and professionals working with financial and investment products.

The course is also relevant to professionals in banks, financial institutions, asset management firms, investment companies, and financial services organizations who participate in assessing client financial positions, designing financial and investment solutions, managing portfolios, or providing wealth-related advice. It is especially useful for professionals working with high-net-worth clients and sophisticated investors whose financial requirements involve multiple objectives, asset classes, liquidity needs, and risk considerations.

Senior managers, Heads of Wealth Management, Private Banking Directors, Investment Managers, Financial Advisory Leaders, Asset Management Executives, and decision makers responsible for financial products and wealth services can also benefit from the programme. It supports leaders seeking to strengthen financial planning frameworks, improve wealth management services, and create more integrated approaches to long-term financial and investment decision-making.

Learning Outcomes

- Analyze a client’s financial position, including income, expenditure, assets, liabilities, and liquidity.
- Identify and prioritize financial objectives according to their importance, time horizon, and future requirements.
- Prepare a comprehensive financial and investment profile reflecting client circumstances and risk capacity.
- Develop an integrated financial plan connecting cash flow management, investment strategy, liquidity, and risk management.
- Evaluate different asset classes and determine their appropriate roles within a wealth management strategy.
- Design appropriate asset allocation and portfolio construction strategies based on client requirements.

- Apply diversification and investment risk management principles to financial and investment portfolios.
- Evaluate liquidity requirements, liabilities, and their impact on investment and wealth management decisions.
- Apply scenario analysis and stress testing to assess the resilience of financial plans and investment portfolios.
- Evaluate portfolio performance and financial plan effectiveness and identify areas for improvement.
- Develop practical recommendations for modifying financial plans and rebalancing portfolios when circumstances change.
- Present a comprehensive financial and wealth management plan covering objectives, investments, risks, liquidity, performance, and ongoing review.

Course Outline

DAY 01

Foundations of Financial Planning and Client Financial Analysis

- Understanding financial planning and its role in wealth management
- The relationship between financial planning, investment management, and wealth management
- Comprehensive client financial analysis
- Assessing income, expenditure, and cash flow
- Analyzing assets, liabilities, and net worth
- Identifying current and future liquidity requirements
- Establishing short-, medium-, and long-term financial objectives
- Prioritizing financial goals according to client needs and time horizons
- Identifying financial and investment constraints
- Developing a comprehensive client financial profile

PRACTICAL APPLICATION

Analyze a client’s financial position and establish financial priorities and objectives

DAY 02

Financial Plan Development and Investment Strategy

- The key stages of integrated financial planning
- Converting financial objectives into measurable investment objectives
- Assessing risk tolerance and risk capacity
- Determining appropriate investment horizons
- Principles of strategic asset allocation
- Evaluating equities and their role in growth strategies
- Fixed income and its role in income generation and stability
- Cash and cash equivalents for liquidity management
- Real assets and alternative investments
- Diversification and multi-asset portfolio construction
- Balancing growth, income, capital preservation, and liquidity

> **PRACTICAL APPLICATION**
>
> Develop an integrated financial plan and investment strategy for a client with multiple objectives

DAY 03

Wealth Management, Risk Management, and Liquidity

- Principles of integrated wealth management
- Identifying and managing wealth-related risks
- Market risk and investment volatility
- Liquidity risk and its impact on financial planning
- Credit and concentration risk
- Liability management within financial planning
- Planning for future financial requirements
- Managing liquidity reserves and contingency requirements
- Scenario analysis and stress testing
- Evaluating financial plan resilience under different market conditions

DAY 03 — CONTINUED

> **PRACTICAL APPLICATION**
>
> Assess a client’s wealth risks and liquidity requirements and develop appropriate management recommendations

DAY 04

Portfolio Management, Performance Measurement, and Financial Review

- Monitoring investment portfolios within the financial plan
- Measuring investment returns and portfolio performance
- Evaluating risk-adjusted performance
- Selecting appropriate performance benchmarks
- Analyzing deviations from investment objectives
- Reviewing strategic asset allocation
- Principles and methods of portfolio rebalancing
- Reviewing financial plans when client circumstances change
- Managing portfolios during periods of market volatility
- Developing periodic financial plan review frameworks

> **PRACTICAL APPLICATION**
>
> Evaluate a financial plan and investment portfolio and identify opportunities for improvement and rebalancing

DAY 05

Advanced Financial Advisory and Integrated Wealth Management

- Developing integrated wealth management strategies
- Connecting financial planning, investment management, and risk management
- Managing complex requirements of high-net-worth clients
- Developing customized financial and investment solutions

DAY 05 — CONTINUED

- Managing long-term client expectations and financial objectives
- Presenting financial and investment recommendations clearly and professionally
- Managing long-term client relationships
- Suitability, professional care, confidentiality, and responsible advisory practices
- Coordination between wealth management, investment, risk, and compliance functions
- Developing continuous financial plan review and monitoring frameworks

FINAL WORKSHOP

Prepare and present a comprehensive financial and wealth management plan covering financial analysis, objectives, asset allocation, portfolio construction, risk management, liquidity, performance measurement, and ongoing review

Register or Request More Information

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