

Course No. 1550

Portfolio Management for Wealth Managers Training Course

**WEALTH MANAGEMENT & PRIVATE BANKING
FINANCE, INVESTMENT & BANKING**

DURATION

5 Days

DELIVERY

Classroom



Course Overview

The Portfolio Management for Wealth Managers Training Course provides a comprehensive professional framework for managing investment portfolios on behalf of high-net-worth clients and sophisticated wealth management customers. The course focuses on developing the capabilities required to translate client objectives, risk preferences, liquidity requirements, and investment horizons into disciplined portfolio strategies. It enables wealth managers to move beyond individual product recommendations and adopt a holistic approach to portfolio construction, monitoring, risk management, and performance evaluation.

Effective portfolio management requires a clear understanding of the relationship between investment objectives, asset allocation, diversification, risk, liquidity, and market conditions. The course therefore examines how wealth managers can assess a client's overall financial profile, establish appropriate investment objectives, develop an investment policy, and determine suitable strategic and tactical asset allocations. Participants also explore how different asset classes can contribute to portfolio growth, income generation, capital preservation, diversification, and liquidity management.

The programme places particular emphasis on multi-asset portfolio management and investment decision-making. Participants examine the characteristics and potential roles of equities, fixed income, cash and cash equivalents, real assets, and alternative investments. They learn how to evaluate investment opportunities, identify concentration risks, monitor portfolio exposures, assess changing market conditions, and make disciplined portfolio adjustments while maintaining alignment with the client's long-term objectives.

Performance measurement and risk management are central components of professional portfolio management. The course addresses portfolio performance evaluation, benchmark selection, return and risk analysis, attribution concepts, portfolio monitoring, stress testing, and rebalancing. Participants also learn how to distinguish between temporary market movements and changes that may require strategic adjustments to the portfolio, helping them make more structured and evidence-based investment decisions.

The course also recognizes that portfolio management is closely connected to the wealth manager's relationship with the client. Participants develop practical skills for communicating portfolio performance, explaining market volatility, managing expectations, discussing investment decisions,

and coordinating with investment specialists, risk teams, compliance professionals, and other stakeholders. Through case studies, portfolio construction exercises, market scenarios, and practical workshops, the Portfolio Management for Wealth Managers Training Course supports stronger investment discipline, improved client advisory, and more effective long-term wealth management.

Objectives

- Analyze client financial profiles, investment objectives, risk tolerance, liquidity requirements, and investment horizons during the course.
- Develop clear investment policies that connect client objectives with appropriate portfolio management strategies.
- Evaluate the characteristics and potential roles of major asset classes within diversified investment portfolios.
- Apply strategic and tactical asset allocation principles to different client objectives and risk profiles.
- Design diversified multi-asset portfolios that balance expected return, risk, liquidity, and concentration considerations.
- Evaluate investment opportunities using relevant quantitative and qualitative investment criteria.
- Assess portfolio risks and identify major sources of market, credit, liquidity, concentration, and other investment exposures.
- Apply portfolio monitoring and performance measurement techniques using appropriate return, risk, and benchmark indicators.
- Evaluate portfolio deviations and determine when rebalancing may be appropriate based on portfolio objectives, client circumstances, and market conditions.
- Improve communication techniques for explaining portfolio performance, investment decisions, market volatility, and portfolio changes to clients.
- Strengthen coordination between wealth managers, investment managers, advisers, risk specialists, compliance teams, and other relevant professionals.
- Develop and present a comprehensive investment portfolio strategy for a high-net-worth client by the end of the course.

Who Should Attend

The Portfolio Management for Wealth Managers Training Course is designed for professionals working in wealth management, private banking, asset management, investment advisory, and portfolio management. It is particularly suitable for Wealth Managers, Portfolio Managers, Private Bankers, Investment Advisers, Financial Advisers, Client Advisers, Investment Managers, Asset Management Professionals, and professionals responsible for managing investment portfolios for high-net-worth and sophisticated clients.

The programme is also relevant to professionals working in investment research, credit, risk management, compliance, investment products, financial planning, and premium banking services who require a stronger understanding of portfolio construction and investment decision-making. Professionals who collaborate with wealth managers and portfolio managers in developing investment, financing, liquidity, or wealth management solutions can also benefit from the programme.

Senior executives, Heads of Wealth Management, Private Banking Directors, Investment Directors, Portfolio Management Leaders, Asset Management Managers, and financial services decision makers can benefit from the course when seeking to strengthen portfolio management frameworks, improve investment governance, enhance client advisory capabilities, and establish more disciplined approaches to investment risk and performance management.

Learning Outcomes

- Analyze a client's complete financial and investment profile and identify appropriate investment priorities.
- Prepare an investment policy that connects client objectives, investment horizon, liquidity requirements, and risk tolerance.
- Evaluate the characteristics and strategic roles of major asset classes within multi-asset portfolios.
- Construct diversified investment portfolios using appropriate asset allocation and risk management principles.
- Select and evaluate investments using relevant quantitative and qualitative criteria.
- Identify concentration risks, portfolio exposures, liquidity constraints, and other significant investment risks.

- Apply portfolio monitoring techniques to assess changes in asset allocation, risk exposure, and investment performance.
- Evaluate portfolio performance using appropriate return, risk, and benchmark measures.
- Analyze the key factors contributing to portfolio performance and identify areas requiring further review.
- Apply disciplined portfolio rebalancing approaches when portfolio allocations or client circumstances change.
- Communicate investment performance, market developments, portfolio risks, and investment decisions clearly to clients.
- Develop and present a comprehensive portfolio management strategy for a high-net-worth client.

Course Outline

DAY 01

Foundations of Portfolio Management for Wealth Managers

- The strategic role of portfolio management in wealth management
- Understanding the relationship between portfolio management and client objectives
- Identifying investment objectives and investment horizons
- Assessing liquidity, income, growth, and capital preservation requirements
- Understanding risk tolerance and risk capacity
- Developing comprehensive client investment profiles
- Principles of investment policy development
- Understanding the relationship between risk and expected return
- Core principles of portfolio diversification
- Goal-based portfolio management

PRACTICAL APPLICATION

Analyze a high-net-worth client profile and develop an initial investment policy framework

DAY 02

Asset Allocation and Multi-Asset Portfolio Construction

- Principles and importance of asset allocation
- Strategic asset allocation and tactical asset allocation
- Characteristics of major asset classes
- Equities, fixed income, cash and cash equivalents, real assets, and alternative investments
- Diversification across markets, regions, sectors, and asset classes
- Managing portfolio concentration and investment exposures
- Constructing portfolios for different risk profiles
- Aligning asset allocation with client objectives
- Integrating liquidity requirements into portfolio construction
- Evaluating portfolio allocation under changing market scenarios

PRACTICAL APPLICATION

Construct a diversified multi-asset portfolio based on client objectives, risk tolerance, and liquidity requirements

DAY 03

Investment Selection and Portfolio Risk Management

- Investment analysis and selection frameworks
- Fundamental, quantitative, and qualitative investment analysis
- Evaluating equities and fixed-income investments
- Assessing investment quality and risk characteristics
- Managing market, credit, liquidity, and concentration risks
- Understanding correlations and portfolio-level risk
- Monitoring portfolio exposure and risk limits
- Scenario analysis and portfolio stress testing
- Evaluating the impact of interest rates, inflation, and market conditions
- Balancing expected return and investment risk

DAY 03 — CONTINUED

PRACTICAL APPLICATION

Analyze an investment portfolio, identify major risk exposures, and recommend appropriate portfolio improvements

DAY 04

Performance Measurement, Rebalancing and Client Communication

- Principles of investment portfolio performance measurement
- Return and risk analysis
- Benchmark selection and comparison
- Understanding portfolio performance attribution
- Evaluating portfolio performance against client objectives
- Identifying deviations from target asset allocations
- Portfolio rebalancing approaches
- Managing portfolios during periods of market volatility
- Communicating investment performance to clients
- Managing client expectations during market uncertainty

PRACTICAL APPLICATION

Evaluate a portfolio's performance and prepare a professional client report covering results, risks, market developments, and recommended rebalancing actions

DAY 05

Strategic Portfolio Management in Wealth Management

- Developing long-term portfolio management strategies
- Integrating portfolio management into comprehensive wealth management
- Aligning investment, liquidity, financing, and wealth objectives
- Reviewing and updating investment policies
- Managing portfolios as client objectives evolve

DAY 05 — CONTINUED

- Developing portfolio review and monitoring frameworks
- Key performance indicators for portfolio management
- Coordinating wealth managers with investment managers and specialist teams
- Documenting investment decisions and monitoring implementation
- Best practices in portfolio management for high-net-worth clients

FINAL WORKSHOP

Develop and present a comprehensive portfolio management strategy covering client objectives, risk assessment, asset allocation, investment selection, liquidity, performance measurement, rebalancing, and client communication

Register or Request More Information

Course page: <https://quest-training.com/courses/portfolio-management-for-wealth-managers-training-course>

Website: <https://quest-training.com>

Email: info@quest-training.com

Phone: +905016771440