QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1476

Wealth Management & Private Banking Training Course

INVESTMENT & ASSET MANAGEMENT
FINANCE, INVESTMENT & BANKING

DURATION
5 Days

DELIVERY
Classroom

Course Overview

The Wealth Management & Private Banking Training Course provides an advanced and practical framework for managing affluent and high-net-worth client relationships, structuring personalized wealth strategies, allocating assets, managing investment risk, and delivering integrated private banking and wealth management solutions. The course focuses on the complete wealth management lifecycle, combining investment management, financial planning, portfolio construction, risk management, estate considerations, financing, and relationship management.

Effective wealth management requires a holistic understanding of a client's financial position, objectives, risk tolerance, liquidity requirements, family circumstances, investment horizon, and long-term priorities. The course examines how private banking and wealth management professionals can move beyond individual financial products toward integrated solutions that address the broader financial needs of high-net-worth and ultra-high-net-worth clients.

The program covers advanced wealth management practices, including client profiling, financial needs analysis, strategic asset allocation, portfolio construction, investment selection, portfolio monitoring, risk management, liquidity planning, credit solutions, and alternative investments. Participants will explore how to develop investment strategies that reflect client objectives while managing diversification, concentration, volatility, liquidity, and market risk.

A strong emphasis is placed on the relationship between investment strategy and the broader private banking proposition. Participants will examine lending and financing solutions, structured products, investment advisory, cash management, family wealth considerations, succession planning concepts, and the coordination of specialist services. The course also addresses suitability, client governance, confidentiality, regulatory considerations, conflicts of interest, and the ethical responsibilities involved in managing significant client assets.

Through case studies, client profiling exercises, portfolio construction workshops, investment allocation simulations, financing scenarios, and private banking relationship management activities, the Wealth Management & Private Banking Training Course develops practical capabilities for delivering sophisticated wealth solutions. The program is suitable for banks, private banks, wealth management firms, investment companies, family offices, financial institutions, government investment entities, and professionals responsible for high-value client relationships and investment portfolios.

Objectives

- Analyze the principles and strategic role of wealth management and private banking in serving affluent and high-net-worth clients during the course.
- Develop comprehensive client profiles based on financial objectives, risk tolerance, liquidity requirements, investment horizon, and personal priorities.
- Evaluate client assets, liabilities, cash flows, investment holdings, and financial needs to identify appropriate wealth management solutions.
- Design strategic asset allocation and diversified portfolio structures aligned with client objectives and risk constraints.
- Apply investment analysis techniques to evaluate equities, fixed income, alternative investments, and other suitable asset classes.
- Assess portfolio risks including market, credit, liquidity, currency, concentration, and behavioral risks.
- Develop integrated wealth strategies combining investment management, liquidity planning, financing, and long-term financial objectives.
- Evaluate private banking lending and credit solutions in relation to client assets, liquidity needs, and investment strategies.
- Strengthen suitability, governance, confidentiality, conflict management, and client protection practices.
- Develop approaches for monitoring portfolio performance and adapting wealth strategies to changing client and market conditions.
- Improve high-net-worth client relationship management through structured communication, needs analysis, and value-based advisory.
- Align wealth management strategies with long-term capital preservation, growth, intergenerational objectives, and sustainable wealth planning.

Who Should Attend

This course is designed for professionals working in private banking, wealth management, asset management, investment advisory, portfolio management, financial planning, treasury, and high-net-worth client services. It is particularly relevant to Private Bankers, Relationship Managers, Wealth Managers, Portfolio Managers, Investment Advisors, Financial Planners, Investment Analysts, Asset Allocation Specialists, Credit Managers, and professionals responsible for developing and managing customized financial solutions for affluent clients.

The program is also suitable for Chief Executive Officers, Private Banking Directors, Heads of Wealth Management, Investment Directors, Treasury Managers, Credit Directors, Family Office Professionals, Investment Committee Members, and senior decision makers responsible for client assets, investment strategy, business development, and portfolio performance. Professionals working in government entities, sovereign-related organizations, banks, financial institutions, investment firms, insurance companies, and large corporations can benefit from the frameworks covered in the course.

The course is particularly valuable for professionals involved in client acquisition, relationship development, investment advisory, portfolio reviews, credit structuring, wealth planning, alternative investments, family wealth coordination, and private banking service delivery. It also provides value for risk, compliance, legal, and governance professionals who need to understand the unique considerations associated with managing significant private wealth.

Learning Outcomes

- Explain the structure, objectives, and operating principles of wealth management and private banking.
- Develop comprehensive client profiles incorporating financial goals, risk tolerance, liquidity requirements, and investment horizons.
- Analyze high-net-worth client assets, liabilities, cash flows, and existing portfolios to identify financial priorities.
- Design strategic asset allocation frameworks appropriate for different client objectives and risk profiles.
- Construct diversified investment portfolios using appropriate asset classes, instruments, and risk controls.
- Evaluate investment opportunities across equities, fixed income, alternatives, and other suitable investments.
- Assess market, credit, liquidity, currency, concentration, and behavioral risks within private wealth portfolios.
- Develop integrated wealth strategies combining investments, financing, liquidity management, and long-term planning needs.
- Evaluate private banking credit and lending solutions in relation to client assets and portfolio requirements.

- Apply appropriate portfolio monitoring, performance measurement, rebalancing, and client review practices.
- Strengthen client relationship management, suitability, confidentiality, and ethical advisory practices.
- Prepare an integrated wealth management proposal that connects investment strategy, risk management, financing, governance, and long-term wealth objectives.

Course Outline

DAY 01

Wealth Management Foundations, Private Banking and Client Strategy

- Principles and evolution of wealth management and private banking
- Differences between retail banking, corporate banking, wealth management, and private banking
- Understanding affluent, high-net-worth, and ultra-high-net-worth client needs
- Client segmentation, profiling, and relationship strategy
- Financial needs analysis and identification of client objectives
- Risk tolerance, investment horizon, liquidity needs, and financial constraints
- Client discovery, advisory conversations, and relationship development
- Suitability, confidentiality, fiduciary considerations, and ethical responsibilities

PRACTICAL APPLICATION

Develop a comprehensive profile for a high-net-worth client and identify financial objectives, constraints, and priority wealth management needs

DAY 02

Investment Strategy, Asset Allocation and Portfolio Construction

- Principles of investment strategy within wealth management
- Strategic and tactical asset allocation
- Portfolio construction and diversification

DAY 02 — CONTINUED

- Equities, fixed income, cash, and alternative investments
- Risk-return trade-offs and portfolio efficiency
- Concentration risk and exposure management
- Liquidity requirements and cash allocation
- Investment selection and portfolio implementation

PRACTICAL APPLICATION

Construct a diversified private wealth portfolio based on client objectives, risk tolerance, liquidity needs, and investment horizon

DAY 03

Advanced Portfolio Management, Risk and Alternative Investments

- Portfolio monitoring and performance measurement
- Market, credit, liquidity, currency, and concentration risks
- Behavioral considerations in private wealth investment decisions
- Scenario analysis and stress testing for wealth portfolios
- Portfolio rebalancing and strategic adjustments
- Alternative investments and their role in wealth diversification
- Private equity, venture capital, real estate, infrastructure, and other alternatives
- Evaluating liquidity, valuation, complexity, and risk in alternative assets

PRACTICAL APPLICATION

Review a client portfolio, identify risk concentrations, conduct scenario analysis, and develop a portfolio rebalancing strategy

DAY 04

Private Banking Credit, Liquidity and Integrated Wealth Solutions

- Role of lending within private banking and wealth management
- Secured lending and asset-backed financing concepts
- Credit assessment for high-net-worth clients
- Relationship between investment portfolios and credit facilities
- Liquidity planning and financing needs
- Credit risk, collateral, leverage, and concentration considerations
- Cash management and treasury solutions for private clients
- Integrating lending, investment, and liquidity solutions

PRACTICAL APPLICATION

Develop a private banking financing solution that integrates credit, collateral, investment assets, and client liquidity requirements

DAY 05

Advanced Wealth Advisory, Governance and Relationship Management

- Integrating investment management and holistic wealth planning
- Long-term capital preservation and wealth growth strategies
- Intergenerational wealth and succession planning considerations
- Family governance and coordination of specialist wealth services
- Portfolio reporting and executive-level client reviews
- Suitability, conflict management, confidentiality, and regulatory considerations
- Building long-term client relationships and increasing advisory value
- Monitoring changing client circumstances and adapting wealth strategies
- Developing a coordinated private banking and wealth management service model

DAY 05 — CONTINUED

> **FINAL WORKSHOP**
>
> Develop and present a comprehensive wealth management strategy covering client profiling, financial objectives, asset allocation, portfolio construction, risk management, alternative investments, private banking credit, liquidity planning, governance, reporting, and long-term wealth objectives

Register or Request More Information

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