Wealth Management

Bundle

19 Hours

Introduction:

Private wealth management is a professional service that offers specialized financial and banking assistance to affluent high-net-worth individuals (HNWIs). To manage these individuals and their vast wealth requires significant skills and expertise across a wide range of functions and roles.

Bundle Content:

In this bundle, participants will learn the many products and services offered by private banks and wealth management firms to their clients through the 2 courses:

- Private Wealth Management Products & Services
- Skills for Private Wealth Managers

Target Audience:

Branch managers, wealth managers, and heads of customer service.

Course Outline:

Course 1: Private Wealth Management Products & Services (6.50 Hours)

Content

- Private Wealth Management - Banking & Deposit Services
- Private Wealth Management - Credit & Lending Services
- Private Wealth Management - Investment Services
- Private Wealth Management - Alternative Investments
- Private Wealth Management - Financial Planning
- Private Wealth Management - Estate Planning
- Private Wealth Management Products & Services – Assessment

Course 2: Skills for Private Wealth Managers (11.45 Hours)

Content

- Private Wealth Management - Functions & Roles
- Private Wealth Management - Client Profiling
- Private Wealth Management - Managing Ultra-HNWIs
- Private Wealth Management - Family Advisory
- Private Wealth Management - Client Acquisition & Pitching
- Private Wealth Management - Relationship Management
- Private Wealth Management - Becoming a Trusted Advisor
- Private Wealth Management - Commercial Awareness
- Private Wealth Management - Negotiation Skills
- Private Wealth Management - Client Investment Management
- Private Wealth Management - Understanding Behavioral Biases
- Private Wealth Management - Suitability

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- Private Wealth Management - Manager Selection
- Private Wealth Management - Managing Compliance Risks
- Private Wealth Management - Scenario
- Skills for Private Wealth Managers – Assessment

Course 3: AI Applications (30 Minutes)

Content

- AI Applications - Wealth & Asset Management

Duration:

Two Months License

Price:

EGP 850