

€ TRAINING

Private Banking and Wealth Management



29 April - 3 May 2024
Lisbon (Portugal)



Private Banking and Wealth Management

REF: T2016 DATE: 29 April - 3 May 2024 Venue: Lisbon (Portugal) - Fee: 5940 Euro

Introduction:

This training program provides professionals with essential skills for effectively managing high-net-worth clients' wealth. Through expert instruction and practical case studies, this program prepares professionals to excel in the dynamic field of private banking and wealth management.

Program Objectives:

At the end of this program, participants will be able to:

- Create a successful investing portfolio to generate wealth while reducing risk.
- Identify potential investments by analyzing financial statements, investment reports, and analyst reports.
- Analyze the volatility and risk of the main financial markets, such as the foreign exchange, derivatives, and international stock exchanges.
- Make risk-adjusted performance measurement calculations and assessments.
- Take measures to protect your wealth against inflation, market volatility, and taxes.

Targeted Audience:

- Wealth managers.
- Private bankers.
- Financial advisors.
- Investment professionals.
- High-net-worth individuals.

Program Outline:

Unit 1:

Private Banking & Wealth Management Essentials:

- Differentiating between private banking and wealth management while understanding their core functions and objectives.
- Exploring the array of financial services offered within wealth management to effectively build and maintain

client relationships.

- Strategizing to maximize returns for both the bank and clients while mitigating associated risks.
- Ensuring a comprehensive understanding of client needs and goals to tailor financial strategies accordingly.
- Fostering trust and loyalty through personalized service and proactive risk management.

Unit 2:

Investment Planning Fundamentals:

- Defining investment objectives by considering factors like liquidity, income, growth, and risk tolerance.
- Conducting a thorough client profile preparation to align investment strategies with individual financial goals.
- Exploring various investment classes including physical assets property, gold, currency and financial assets shares, bonds, derivatives.
- Understanding market dynamics, efficiency, volatility, and the regulatory framework impacting investment decisions.
- Collaborating with financial institutions, advisors, and analysts to optimize investment strategies within regulatory and tax constraints.

Unit 3:

Investment Analysis and Portfolio Performance Evaluation:

- Performing comprehensive financial analysis utilizing fundamental, technical, and ratio analysis techniques to identify lucrative investments.
- Applying the Capital Asset Pricing Model CAPM to estimate required returns relative to risk exposure.
- Evaluating portfolio performance using metrics like Jensen, Traynor, and Sharpe ratios to gauge investment efficiency.
- Learning from historical cases like Enron to mitigate investment risks and enhance decision-making.
- Utilizing financial statements and investment ratio analysis to make informed investment decisions aligned with client objectives.

Unit 4:

Wealth Protection and Risk Management Strategies

- Balancing risk and return through the risk-return trade-off paradigm and understanding key risk measurement metrics like beta and standard deviation.

- Implementing portfolio theory and diversification strategies to reduce investment risk and optimize portfolio efficiency.
- Safeguarding against exchange rate fluctuations and market volatility through hedging techniques and risk management strategies.
- Exploring life assurance and related investments to provide financial security in varying market conditions.
- Adapting investment strategies to navigate both bull and bear market scenarios effectively.

Unit 5:

Estate Planning and Wealth Succession:

- Crafting comprehensive retirement plans encompassing pensions, annuities, and other retirement vehicles to ensure financial stability in later years.
- Understanding the risks associated with wealth distribution, life expectancy considerations, and the importance of wills in estate planning.
- Developing tax-efficient strategies and mitigating inheritance tax implications to preserve wealth for future generations.
- Exploring the role of trusts in wealth management and succession planning to protect assets and ensure smooth transition.
- Adopting a holistic approach to wealth management that encompasses retirement, estate planning, and tax optimization strategies.