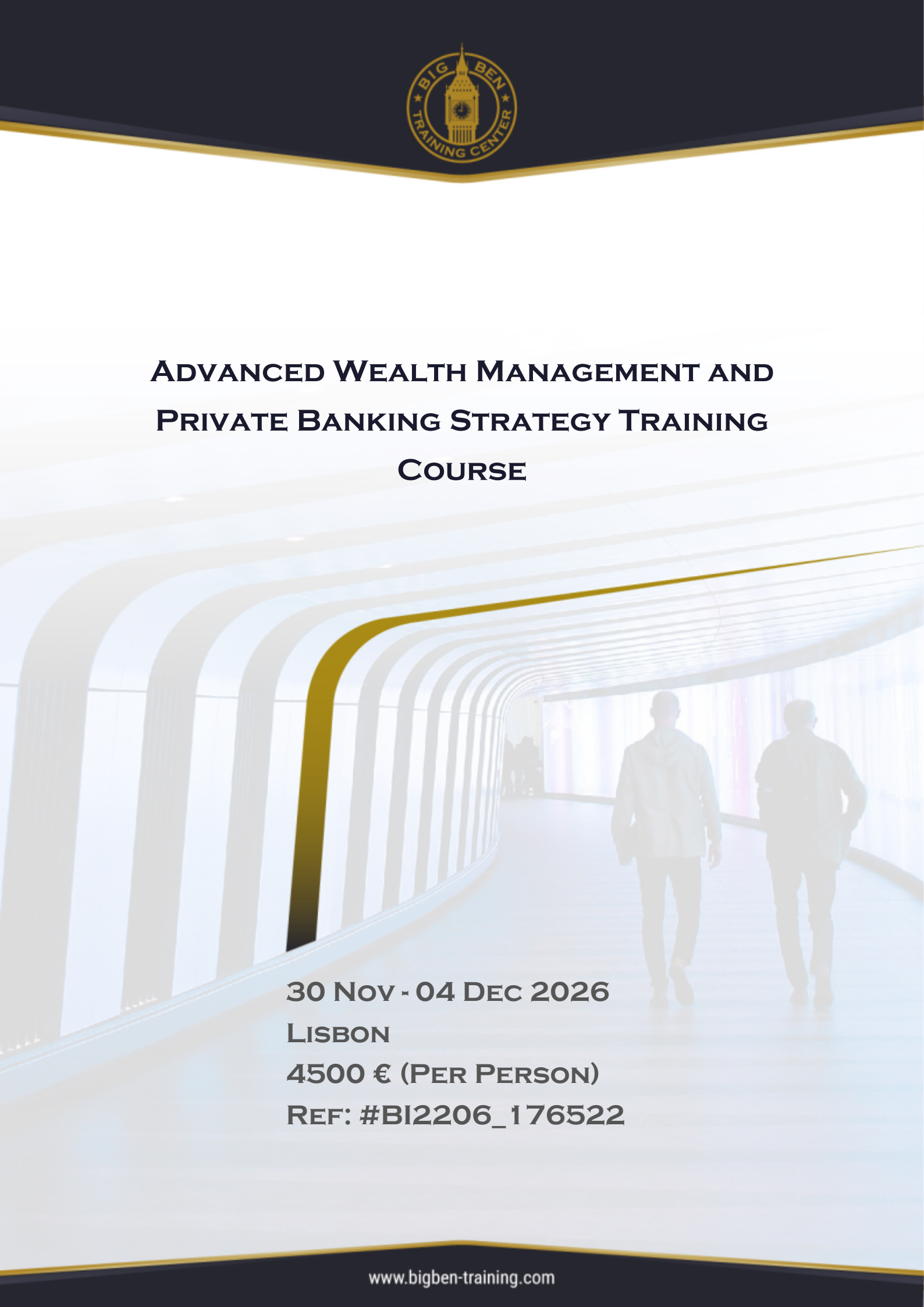
Advanced Wealth Management and Private Banking Strategy Training Course



30 Nov - 04 Dec 2026

Lisbon

4500 € (Per Person)

Ref: #BI2206_176522

Course Introduction / Overview:

The landscape of wealth management and private banking is undergoing a profound transformation, moving beyond traditional asset management to a holistic model of financial stewardship for High-Net-Worth Individuals (HNWIs) and their families. This evolution demands a new breed of advisor, one equipped with not only sophisticated investment acumen but also deep expertise in wealth structuring, estate planning, risk management, and client psychology. As the renowned financial planner Harold Evensky articulated in his seminal work, "The New Wealth Management," the modern advisor's role is to be the client's trusted financial architect. This intensive program from BIG BEN Training Center is meticulously designed to cultivate such expertise. It provides a comprehensive A-to-Z journey into the exclusive world of private banking, covering everything from the intricacies of asset allocation and alternative investments to the nuances of building enduring, trust-based client relationships. Participants will explore advanced strategies for wealth preservation and growth, navigate the complex regulatory environment, and prepare for the future of the industry, shaped by FinTech and sustainable investing. This course is the definitive platform for professionals seeking to master the art and science of managing significant wealth.

Target Audience / This training course is suitable for:

- Private Bankers and Relationship Managers.
- Wealth Managers and Financial Advisors.
- Investment Consultants and Portfolio Managers.
- Financial Planners serving high-net-worth clients.
- Family Office Executives and Staff.
- Trust Officers and Estate Planners.
- Professionals in asset management seeking to specialize in private wealth.
- Aspiring professionals aiming to enter the private banking sector.

Target Sectors and Industries:

- Commercial and Private Banks.
- Investment Banking and Brokerage Firms.
- Asset Management and Investment Companies.
- Independent Financial Advisory (IFA) Firms.
- Multi-Family and Single-Family Offices.
- Insurance Companies with wealth management divisions.
- Legal and Accountancy Firms providing wealth advisory services.
- Governmental financial institutions and regulatory bodies.

Target Organizations Departments:

- Private Banking and Wealth Management.
- Asset Management and Portfolio Management.
- Investment Advisory and Financial Planning.
- Client Relationship Management.
- Trust and Estate Services.
- Compliance and Risk Management.
- Business Development and Sales.

Course Offerings:

By the end of this course, the participants will have able to:

- Develop comprehensive, goal-oriented financial plans for affluent clients.
- Master advanced portfolio construction and strategic asset allocation techniques.
- Implement effective tax optimization and multi-generational estate planning strategies.
- Analyze and integrate alternative investments like private equity and real estate into portfolios.
- Build and maintain long-term, trust-based relationships with HNWIs.
- Navigate the complex regulatory and compliance landscape of global private banking.
- Leverage behavioral finance principles to improve client decision-making and satisfaction.
- Formulate effective client acquisition and business development strategies in the wealth sector.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be immersive, practical, and highly interactive, ensuring that participants not only learn the theories of wealth management but can also apply them effectively. We move beyond traditional lectures to create a dynamic learning environment that mirrors the challenges and opportunities of the real world. The course is built upon a foundation of expert-led sessions that break down complex financial concepts into understandable components. These sessions are heavily supplemented with real-world case studies of HNWIs and family offices, requiring participants to analyze situations and propose strategic solutions. A significant portion of the training is dedicated to collaborative group workshops and role-playing exercises, where participants will simulate client discovery meetings, investment committee presentations, and difficult client conversations. This hands-on approach fosters critical thinking and practical skill development. Continuous feedback from instructors and peers is a core component, allowing for personal growth and the refinement of advisory skills throughout the five-day program. The methodology ensures a transition from academic knowledge to professional mastery.

Course Agenda (Course Units):

Unit One: Foundations of Modern Wealth Management

- Introduction to the Private Banking and Wealth Management Industry.
- Profiling the High-Net-Worth (HNW) and Ultra-High-Net-Worth (UHNW) Client.
- The Comprehensive Wealth Management Process and Value Proposition.
- Global Wealth Trends and Evolving Market Dynamics.
- Understanding Fiduciary Duties, Ethics, and Professional Conduct.
- The Regulatory Framework: KYC, AML, and Cross-Border Compliance.
- Applying Behavioral Finance to Understand Client Biases and Decisions.

Unit Two: Holistic Financial Planning and Portfolio Management

- The Art of Client Discovery and Financial Goal Setting.
- Developing the Investment Policy Statement (IPS).
- Strategic and Tactical Asset Allocation Models for Affluent Clients.
- Advanced Portfolio Construction: Core-Satellite and Factor-Based Investing.
- In-Depth Analysis of Equity and Fixed Income Strategies.
- Quantitative and Qualitative Risk Management Techniques.
- Performance Measurement, Attribution, and Client Reporting Standards.

Unit Three: Advanced Wealth Structuring and Preservation

- Fundamentals of Estate Planning: Wills, Trusts, and Probate Avoidance.
- International Tax Planning and Tax Optimization Strategies.
- Business Succession Planning for Entrepreneurs and Family Enterprises.
- Advanced Asset Protection Structures and Jurisdictional Considerations.
- The Strategic Role of Life Insurance in Wealth and Estate Plans.
- Structuring and Managing Family Offices.
- Philanthropic Planning, Impact Investing, and Charitable Giving Vehicles.

Unit Four: Alternative Investments and Client Relationship Mastery

- An Overview of the Alternative Investment Landscape.
- Deep Dive into Hedge Funds and Private Equity.
- Evaluating Real Estate, Infrastructure, and Private Credit Investments.
- Due Diligence Processes for Selecting Alternative Asset Managers.
- Mastering the Art of Building Trust and Rapport with Affluent Clients.
- Advanced Communication, Presentation, and Negotiation Skills.
- Managing Client Expectations and Navigating Difficult Conversations.

Unit Five: The Future of Private Banking and Business Development

- The Impact of FinTech, AI, and Robo-Advisors on the Industry.
- Integrating Sustainable (ESG) Principles into Investment Portfolios.
- Navigating the Challenges of Digital Transformation in Client Servicing.
- Effective Client Acquisition and Onboarding Strategies.
- Developing a Personal Brand as a Trusted Advisor.
- Networking and Building a Professional Referral System.
- Capstone Simulation: Creating a Holistic Wealth Management Plan for a Complex Client Case.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

As wealth becomes increasingly digital and global, how can private bankers maintain the deeply personal, trust-based relationships that have historically defined the industry, while simultaneously embracing technological efficiency and scale?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by adopting a truly holistic and forward-looking perspective on wealth management, moving far beyond the confines of traditional investment product training. While other programs may focus narrowly on portfolio management, our curriculum integrates the critical pillars of advanced financial planning, multi-generational estate and tax strategy, behavioral finance, and sophisticated client relationship management. We place a significant emphasis on the 'art' of being a trusted advisor, dedicating substantial time to communication skills, ethical considerations, and understanding the complex psychology of the affluent client. Furthermore, the course is uniquely future-focused, with dedicated modules on the disruptive impact of FinTech, the growing importance of ESG and sustainable investing, and the strategies needed to thrive in a digitally transformed industry. The methodology, centered on complex case studies and realistic simulations rather than passive lectures, ensures that participants leave not just with knowledge, but with the confidence and practical ability to develop comprehensive, life-long financial strategies for the most discerning clients. It is designed to cultivate strategic thinkers, not just financial technicians.