Strategic Banking Sales and Wealth Management Excellence Training Course



23 - 27 Nov 2026

Lisbon

4500 € (Per Person)

Ref: #SAL6376_130406

Course Introduction / Overview:

This comprehensive course is designed to equip banking and finance professionals with the advanced skills required to excel in the competitive fields of strategic sales and wealth management. In an industry where client relationships and sophisticated financial solutions are paramount, this program provides a deep dive into the methodologies that drive success. Drawing upon principles discussed by thought leaders like Thomas J. Stanley in his influential book "The Millionaire Next Door," the course explores the mindset and needs of high-net-worth individuals. Participants will learn to move beyond transactional selling to become trusted financial advisors, capable of crafting bespoke wealth management strategies. BIG BEN Training Center has developed this curriculum to integrate cutting-edge sales techniques with the fundamentals of financial planning, portfolio management, and regulatory compliance. The program focuses on practical application, ensuring that attendees can immediately implement learned strategies to attract, retain, and grow their client base, ultimately driving significant revenue and building a reputation for excellence in the financial services sector. This training is an essential investment for those committed to reaching the pinnacle of their profession in banking sales and private wealth advisory.

Target Audience / This training course is suitable for:

- Relationship Managers.
- Private Bankers.
- Wealth Managers.
- Financial Advisors and Planners.
- Investment Consultants.
- Banking Sales Team Leaders and Managers.
- Client Service Executives in the financial sector.
- Professionals aspiring to a career in private banking or wealth management.

Target Sectors and Industries:

- Commercial and Retail Banks.
- Private Banking Institutions.
- Investment Management Firms.
- Wealth Management and Advisory Companies.
- Insurance and Financial Services Companies.
- Brokerage Firms.
- Credit Unions and Cooperative Banks.
- Governmental financial authorities and regulatory bodies.

Target Organizations Departments:

- Private Banking and Wealth Management.
- Sales and Business Development.
- Retail Banking.
- Affluent Banking Services.
- Investment Advisory.
- Client Relationship Management.
- Corporate Banking.
- Product Management.

Course Offerings:

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

- Develop and implement advanced strategic sales plans for banking products and services.
- Master the art of acquiring and retaining high-net-worth clients.
- Conduct comprehensive financial needs analysis and risk profiling for clients.
- Design and propose tailored wealth management and investment solutions.
- Effectively cross-sell and up-sell a diverse range of financial products.
- Build and maintain long-term, trust-based relationships with affluent clients.
- Navigate the regulatory and compliance landscape of wealth management.
- Utilize digital tools and technologies to enhance sales and client service.
- Enhance negotiation, presentation, and communication skills for financial advisory.

Course Methodology:

The training methodology employed by BIG BEN Training Center is designed to be highly interactive, engaging, and practical, ensuring a transformative learning experience. We move beyond traditional lecture-based formats to a participant-centered approach that fosters deep understanding and skill development. The course heavily utilizes real-world case studies from the banking and wealth management sectors, allowing participants to analyze complex client scenarios and develop strategic solutions in a controlled environment. Interactive group discussions and brainstorming sessions encourage the sharing of diverse perspectives and collaborative problem-solving. A significant portion of the training is dedicated to role-playing exercises, where participants can practice client acquisition pitches, financial advisory conversations, and objection handling, receiving immediate and constructive feedback from the instructor and peers. The curriculum also includes workshops on financial planning tools and digital sales platforms. Our expert facilitators guide participants through each module, blending theoretical knowledge with actionable insights and practical tools that can be applied directly to their professional roles. This immersive and hands-on approach ensures that learning is not just absorbed but also mastered for immediate workplace impact.

Course Agenda (Course Units):

Unit One: Foundations of Strategic Sales in Modern Banking

- The evolution of banking sales from transactional to advisory.
- Understanding the modern financial consumer and their expectations.
- Core principles of strategic selling in the financial services industry.
- Integrating sales processes with the bank's overall business strategy.
- Key performance indicators (KPIs) for measuring sales success.
- The psychology of selling to affluent and high-net-worth individuals.
- Ethical considerations and building a foundation of trust.

Unit Two: Advanced Client Acquisition and Relationship Management

- Prospecting and lead generation techniques for the high-net-worth segment.
- Crafting a compelling value proposition for wealth management services.
- Mastering the discovery process and conducting effective needs analysis.
- Building and managing a robust sales pipeline.
- Advanced networking strategies within the financial community.
- Client onboarding processes that foster long-term loyalty.
- Techniques for turning satisfied clients into brand advocates and referral sources.

Unit Three: The Core Components of Wealth Management

- Introduction to comprehensive financial planning.
- Investment management principles and asset allocation strategies.
- Retirement planning solutions and products.
- Estate planning, trusts, and wealth transfer fundamentals.
- Insurance and risk management for wealth protection.
- Tax planning considerations in wealth management.
- Developing a holistic and personalized financial plan for clients.

Unit Four: Product Knowledge and Solution-Based Selling

- In-depth analysis of investment products like mutual funds, bonds, and equities.
- Understanding structured products and alternative investments.
- Leveraging credit and lending solutions for wealth creation.
- Cross-selling insurance, credit cards, and other retail banking products.
- Matching complex financial products to specific client needs and goals.
- Presenting complex financial solutions in a clear and persuasive manner.
- Staying updated on new products and market trends.

Unit Five: Compliance, Digital Transformation, and Future-Proofing Your Career

- Navigating the regulatory framework of banking sales and wealth advisory.
- Anti-Money Laundering (AML) and Know Your Customer (KYC) compliance.
- The role of FinTech and digital tools in modern wealth management.
- Using CRM systems to enhance client relationships and sales efficiency.
- Developing a personal brand as a trusted financial advisor.
- Strategies for continuous professional development and learning.
- Final project presentation on a comprehensive client wealth management strategy.

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:

In an era of increasing automation and robo-advisors, what is the enduring, irreplaceable value of the human touch in high-net-worth wealth management?

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

This course distinguishes itself through its holistic and integrated approach, seamlessly blending the art of strategic sales with the science of comprehensive wealth management. Unlike programs that treat these as separate disciplines, our curriculum is built on the premise that true success in modern banking lies at the intersection of both. We move beyond generic sales tactics to focus on the sophisticated consultative selling required for the high-net-worth segment, emphasizing trust-building and long-term advisory relationships. The course's practical orientation is another key differentiator. Participants engage extensively with real-world case studies, complex client simulations, and role-playing scenarios that mirror the challenges they face daily. This hands-on methodology ensures that theoretical knowledge is translated into tangible skills. Furthermore, the curriculum is forward-looking, addressing the impact of digital transformation, FinTech, and evolving regulatory landscapes on the industry. It equips professionals not just for the current market but provides them with the strategic foresight to adapt and thrive in the future of financial services, making it an unparalleled investment in their professional development.