MVLCO

Wealth Management

Duration: 16 Hours / 2 days

Course contents –

- Private Banking and Wealth Management – an Overview
- Wealth Management Services
  - Investment and Investment Advisory Services
    - Discretionary
    - Advisory
- Access to
    - Hedge Funds
    - Private Equity
    - REITs
  - Independent Asset Management Solutions
  - Estate and Succession Planning
  - Trust and Fiduciary Services
  - Private Banking (Credit and Deposit Services)
  - Financial and Tax Planning
  - Insurance Services
  - Brokerage Services
  - Employee Benefit Services
- Portfolio performance evaluation
- Fees, commission and income from private banking/wealth management
- Wealth Management - Client Acquisition & Relationship Management
- Client segmentation and client value management
- Wealth Management - Techniques of Investing (Financial market, Real Estate etc.)
- Wealth Management - Use of IT Systems in Wealth Management
- Wealth Management - Technology Market (Build or Buy)
- Current trends in WM Industry and The Future
- Common Terminology Used in Wealth Management
- Regulatory & Tax Issues