

€ TRAINING

Private Banking and Wealth Management



14 - 18 April 2025
Trabzon (Turkey)



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REF: T2016 DATE: 14 - 18 April 2025 Venue: Trabzon (Turkey) - Fee: 5300 Euro

Introduction:

Private banking and wealth management focus on providing personalized financial services to high-net-worth individuals. This training program covers the essential principles and strategies involved in private banking, wealth management, and investment planning. Through it, participants will learn to design tailored financial solutions, manage risks, protect wealth, and plan for the future, ensuring a comprehensive approach to financial success for clients.

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 their 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.
- Importance of 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.
- 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.