E-Learning Training Program

Private Wealth Management

(On Demand)

Program Overview

This course offers comprehensive insights into today's wealth management and private banking industry. Perfect for aspiring wealth managers, financial planners, or anyone aiming to manage high-net-worth or family assets more effectively.

Program Objectives

Upon the completion of the program participants will be able to:

- Gain a solid understanding of the wealth management and private banking industry, including its structure, key players, and client segments.
- Explore the range of products, services, and solutions offered by wealth management professionals to meet diverse client needs.
- Gain the essential skills and knowledge needed to effectively manage high-net-worth and family assets.

Program Contents

This program will cover 21 tutorials spread to 2 topics as follows:

- ► Topic 1: Skills for Private Wealth Managers
- ► Topic 2: Private Wealth Management Products & Services

Topic 1: Skills for Private Wealth Managers:

- Private Wealth Management – Functions & Roles.
- Private Wealth Management – Client Profiling.
- Private Wealth Management – Managing Ultra- HNWIs.
- Private Wealth Management – Family Advisory.
- Private Wealth Management – Client Acquisition & Pitching.
- Private Wealth Management – Relationship Management.
- Private Wealth Management – Becoming a Trusted Advisor.
- Private Wealth Management – Commercial Awareness.
- Private Wealth Management – Negotiation Skills.
- Private Wealth Management – Client Investment Management.

- Private Wealth Management – Understanding Behavioral Biases.
- Private Wealth Management – Suitability.
- Private Wealth Management – Manager Selection.
- Private Wealth Management – Managing Compliance Risks.
- Private Wealth Management – Scenario.

Topic 2: Private Wealth Management Products & Services:

- Private Wealth Management – Banking & Deposit Services.
- Private Wealth Management – Credit & Lending Services.
- Private Wealth Management – Investment Services.
- Private Wealth Management – Alternative Investments.
- Private Wealth Management – Financial Planning.
- Private Wealth Management – Estate Planning.

Program Administration

Program Language
The program will be delivered in English.

Training Delivery
The program will be on demand in collaboration with the INTUITION Platform.

Target Audience
Aspiring wealth managers and financial planners.

Program Level
Intermediate.

Program Duration
1 month from the date of receiving the login credentials to complete all topics.

Certification
Certificate of Completion, after passing all topics with a minimum score of 70%.

Registration Fees
90 KD.

For further inquiries, please contact the program coordinator:

Ms. Alaa Alyaqout

Officer – Operations Department

Tel: 22901159

Email: alaa.alyaqout@kibs.edu.kw / cc: operations@kibs.edu.kw

Website: www.kibs.edu.kw