

Wealth Management Strategies for the Indian Market

A Workshop

Programme Content

Indian Wealth Management Market Overview

- ▲ Global products and market trends
- ▲ Indian market potential

Role of Macroeconomics understanding for Wealth Managers

- ▲ Business cycles
- ▲ Investment climate – role of interest rates, inflation and exchange rates
- ▲ Monetary and fiscal policies
- ▲ Policies relating to Capital inflows/outflows

Road Map to wealth creation

- ▲ Wealth management Strategies – Aggressive, Moderate, Conservative
- ▲ Global investment Philosophies
- ▲ Self-management Vs Investment professionals to manage our money
- ▲ Case Study

Steps towards successful wealth management

- ▲ Financial planning
- ▲ Identifying goals – Defining life style
- ▲ Identifying gaps in goals and resources
- ▲ Understanding asset classes
- ▲ Planning, executing and monitoring
- ▲ Case Study

Wealth management and Private Banking

- ▲ Increased investment options – Traditional Vs Emerging asset classes
- ▲ Investment research process
- ▲ Portfolio building

Programme Content (Cont..)

The Sales Process: Client Targeting and Client Segmentation Methods

- ▲ Difference between accounts, customers and clients (private clients, retail, business clients)
- ▲ Client acquisition (new accounts) Vs existing client base (share of wallet)
- ▲ Segmentation techniques and criteria (by size, by income, by branch)

Client Profiling Process

- ▲ The customer life cycle The investor life cycle – accumulate, consolidate, retirement phase
- ▲ The client's balance sheet
- ▲ Understanding the client's paradigm(s)

Selling Investment Products to Private Investors

- ▲ Uncovering client investment needs
- ▲ Integrating alternative investment solutions with traditional solutions
- ▲ Objections based on misunderstanding, skepticism or genuine drawbacks
- ▲ Handling objections: explaining, proving, offsetting

Who should Attend?

- ▲ Private Bankers
- ▲ Financial Planners
- ▲ Wealth Managers
- ▲ Portfolio Management Professionals
- ▲ Product Development Specialists in various asset classes
- ▲ Chief Investment Officers
- ▲ Fund Managers
- ▲ Financial Consultants
- ▲ Client Relationship Managers
- ▲ Investment Advisors and Counselors
- ▲ Distributors of Financial Products and Services across all Investment asset classes and High Net worth Professionals.
- ▲ This will also benefit the Technology solution providers and business analysts in the domain of wealth management and Private Banking and Corporate Finance Managers involved in structuring Compensation, Employee Retirement and Pension Benefits



Programme Details

The programme includes:

- ▲ Two day workshop
- ▲ Course material along with the Workbook
- ▲ Networking opportunities throughout the workshop
- ▲ Lunch and refreshments