

PRIVATE BANKING AND WEALTH MANAGEMENT: OPTIMISING CLIENT RELATIONSHIPS

BY PROFESSOR PHILIP MOLYNEUX, PROFESSOR IN BANKING AND
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ASIAN
BANKING
SCHOOL

PROGRAMME DESCRIPTION

The programme considers the rapidly growing wealth of South East Asia and how traditional banks can profitably focus on the provision of Private Banking and Wealth Management services. The needs of wealthy individuals (HNWIs) are many and varied but essentially all require a personal standard of service and a high level of dedicated time and commitment. In return, a Private Bank seeks to achieve a profitable and sustainable growth model from the provision of creative and differentiated wealth solutions. This programme focuses on ways in which client relationships may be optimised to generate win-win outcomes for both clients and the bank.

TRAINING METHODOLOGY

The programme is a combination of group led discussions and presentations, together with practical case studies and exercises mainly in syndicates of participants. The training is experiential and participants are encouraged to share their own experiences and contribute to group dynamics.

PARTICIPANT PROFILE

Private Bankers, Wealth Managers, Financial Advisers, Relationship Managers, Family Office Managers, and Senior Bankers with strategic development responsibilities.

PROGRAMME DETAILS

Date : 10 - 12 October 2016 (3 days)
Time : 9:00am - 5:00pm
Venue : Asian Banking School,
NU Tower 2, Kuala Lumpur Sentral

Programme Fee*

**MYR
15,000**

The cost of the programme includes lunch and other refreshments, as well as programme materials for one participant.

**inclusive of 6% GST*

DAY 1

BUILDING CLIENT SATISFACTION AND RETENTION STRATEGIES

- Distinguishing Private Banking and Wealth Management Services
- Identifies the features of key client types (HNWIs and Super Rich)
- Explains various client segmentation approaches
- Investigates how client segmentation drives the services on offer
- Provides an understanding of the client's financial needs and describes the wealth advisory process - the trusted personal adviser
- Family Office Services
- Discuss the approaches used to measure and manage the profitability of a portfolio of clients

DAY 2

PRODUCTS AND INVESTMENT SOLUTIONS

- Outlines the different types of investment services offered by wealth managers
- Explains the various types of investment strategies and styles
- Discusses the role of open architecture product sourcing
- Introduces the portfolio allocation of HNWIs and regional variations
- Explains the role of cash management and lending services provided by wealth managers
- Evaluate the key features of structured products – capital protected products and single stock hedges
- Discusses the increased use and features of alternative investments – hedge funds, private equity, commodities (hard and soft) and property

DAY 3

TAXATION, REGULATIONS AND FUTURE PROSPECTS

- Highlights tax issues relevant to wealth management clients
- Identifies legal ways of reducing tax liabilities
- Discusses various regulatory environments
- Examines legislation and other regulatory issues governing money laundering
- Highlights legislation that impacts on HNWIs (e.g. MIFID, FATCA and the EU Savings Directive)
- Examines the future prospects for the industry both in advanced and emerging markets

ABOUT THE TRAINER



PHILIP MOLYNEUX is the Dean of the College of Business, Law, Education and Social Sciences, and Professor of Banking and Finance. He teaches Post Graduate studies in both Financial Institutions Strategic Management and Investment and Private Banking; and his main area of research is on structure and efficiency of banking markets. He has also extensively contributed and edited numerous publications and articles on banking areas including the Palgrave Macmillan Studies in Banking and Financial Institutions (97 books by 2016), The Handbook of Post Crisis Financial Modelling (2015, co-edited), Bank Competition, Efficiency and Liquidity Creation in Asia Pacific (2015, co-wrote), The Oxford Handbook of Banking (2014), Earnings management, forecast guidance and the banking crisis (2015), 'Too systemically important to fail' in banking – Evidence from bank mergers and acquisitions (2014), and Earnings management, forecast guidance and the banking crisis (2015).

He has acted as a consultant to the New York Federal Reserve Bank, World Bank, European Commission, UK Treasury; Citibank Private Bank, Barclays Wealth, McKinsey & co, Credit Suisse and various other international banks and consulting firms. Phil was the recipient of the British Accounting and Finance Association Distinguished Academic Award in 2013.



BANGOR BUSINESS SCHOOL is consistently ranked as one of the top Universities in Europe and in the world Top 20 for its Banking research (Federal Reserve Bank of St Louis / RePEc, 2015). The School is also ranked in the top 25% of UK business schools for its Business and Management research (Times Higher Education, 2015).

In Malaysia, the Bangor Business School is best known for its Chartered Banker MBA programme; the only dual award of the prestigious MBA and professional Chartered Banker qualification.

To register for this programme, please visit the Executive Education page on our website at www.asianbankingschool.com/our-programmes/executive-education

FIND OUT MORE ABOUT OTHER ABS EXECUTIVE EDUCATION PROGRAMMES

Visit our website at www.asianbankingschool.com or
email us at training@asianbankingschool.com



The **ASIAN BANKING SCHOOL (ABS)** is the industry provider of premium professional certification and capability development programmes. Dedicated to developing talent, it specializes in professional banking education and serves as a channel for intellectual content and thought leadership for the banking sector.

Created for the industry by the industry as an independent entity, ABS was built upon the decades-long experience of the Institute of Bankers Malaysia (IBBM) in delivering professional qualifications and training programmes. It was registered in 2012 and after its official launch by the Bank Negara Malaysia Governor at the end of 2013, ABS started full operations in August 2015.

At the helm of ABS is Chief Executive Officer Professor Colyn Gardner, who has had a long illustrious career immersed in banking. He has been a practising banker, a banking consultant to many of the world's largest banks and organisations, an innovative training course developer, a professor of banking, a successful Conference Speaker on banking topics and a corporate client of banks. He founded and built several companies that have listed on the London Stock Exchange, including DC Gardner Group plc; the largest and leading banking training consultancy of its time, and a name that is still respected around the world today. His entrepreneurial and innovative spirit, commitment and strength in the areas of talent development will see him steering ABS towards its strategic direction in delivering highly regarded training for banking professionals internationally.

As one of the industry's preferred partner in learning and development, ABS offers industry relevant training programmes that cover a comprehensive list of banking areas and are designed and developed in-house by our Specialist Training Consultancy Team or in collaboration with strategic learning partners that includes some of the top business schools in the world. It also provides specialised consulting services and tailored learning solutions to meet the specific needs of our clients; with executive education offerings already being planned for in the near future.

ABS works closely with the Asian Institute of Chartered Bankers in raising competency standards for the banking industry through the delivery of training and exams for professional qualifications developed and awarded by the professional body.

ABS also plays a significant role in enriching the talent pipeline for the financial services sector through the industry recognised Financial Sector Talent Enrichment Programme (FSTEP).

Guided by the transformation blueprint for the Malaysian banking education landscape, it is the aim of ABS to innovate the approach of developing talent, and in turn raise the calibre and dynamism of professionals in the industry.

For training enquiries, please contact:

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