

## BEST INVESTMENTS FOR HIGH NET WORTH (HNW) INVESTORS & PRIVATE BANKING

*“Design and Deliver Tailored Investment Strategies for HNW Clients with Precision and Insight”*

### Schedule

| Date             | Venue       | Fees (Face-to-Face)   |
|------------------|-------------|-----------------------|
| 09 - 10 Sep 2026 | Doha, Qatar | USD 1995 per delegate |
| 28 - 29 Oct 2026 | Doha, Qatar | USD 1995 per delegate |

► **Available delivery methods:** Face-to-Face & Online Training

### Introduction

The financial expectations and risk appetites of High Net Worth (HNW) clients are evolving rapidly. Private bankers and wealth managers must not only offer access to elite investment opportunities but also provide structured, risk-adjusted solutions that meet long-term wealth preservation and growth goals.

This exclusive 2-day training delivers a comprehensive guide to understanding and deploying high-impact investment strategies tailored for HNW clients. Participants will explore portfolio construction, alternative investments, private markets, ESG preferences, and relationship management approaches specific to private banking environments.

### Objectives

By the end of this course, participants will be able to:

- Understand the unique financial goals and behavioral profiles of HNW investors
- Structure portfolios using asset allocation models suited for high net worth profiles
- Evaluate and recommend investments including hedge funds, private equity, and real estate
- Align investment strategies with tax efficiency, estate planning, and succession goals
- Build trust, rapport, and long-term relationships with sophisticated clients

## Why Attend

- Gain a structured overview of investment vehicles suited to affluent clients
- Enhance your advisory capabilities with sophisticated wealth planning tools
- Explore risk management, diversification, and behavioral finance from a private banking perspective
- Benchmark your service approach with global best practices in client relationship management
- Expand your understanding of regulatory, ESG, and cross-border investment considerations

## Target Audience

This program is designed for:

- Private bankers, wealth advisors, and relationship managers
- Investment advisors, portfolio managers, and family office professionals
- Financial planners and client-facing staff in private wealth institutions
- Professionals involved in structuring, advising, or managing HNW assets

## Individual Benefits

Key competencies that will be developed include:

- Advanced client profiling and portfolio design
- Understanding of alternative and structured products
- Behavioral finance and client communication skills
- High-touch relationship management practices
- Strategic advisory aligned with client life-cycle needs

## Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Enhanced ability to attract, retain, and grow HNW client relationships
- Improved client satisfaction through tailored and goal-based solutions
- Better product suitability and compliance in HNW advisory contexts
- Increased AUM (assets under management) and client loyalty
- Strengthened market positioning in the private banking segment

## Instructional Methodology

The course follows a blended learning approach combining theory with practice:

- Strategy Briefings - Overview of private wealth trends, portfolio strategies, and HNW segmentation
- Case Studies - Real-world client scenarios and investment portfolio simulations
- Workshops - Risk profiling, model portfolio creation, and investment strategy comparison
- Peer Exchange - Dialogue on regional challenges, global standards, and service innovation
- Tools - Client discovery templates, investment evaluation scorecards, and portfolio planning tools

## Course Outline

### DETAILED 2-DAY COURSE OUTLINE

**Training Hours:** 7:30 AM – 3:30 PM **Daily Format:** 3–4 Learning Modules | Coffee breaks: 09:30 & 11:15 | Lunch Buffet: 01:00 – 02:00

#### Day 1: Understanding HNW Clients and Investment Approaches

- Module 1: High Net Worth Investor Profiles (07:30 – 09:30) • Characteristics, goals, and behaviors of HNW clients • Generational preferences and risk tolerance trends • The psychology of wealth and relationship dynamics
- Module 2: Core & Satellite Portfolio Construction (09:45 – 11:15) • Diversification principles and asset allocation models • Public equities, fixed income, and ETFs for HNW profiles • Balancing capital preservation and growth
- Module 3: Alternative and Private Market Investments (11:30 – 01:00) • Hedge funds, private equity, venture capital, and real estate • Risk-return tradeoffs and access structures for HNW clients
- Module 4: Workshop – Client Case Simulation (02:00 – 03:30) • Build a portfolio for a sample HNW client scenario

#### Day 2: Strategic Wealth Advisory and Relationship Management

- Module 1: Risk Management, Succession & Tax Efficiency (07:30 – 09:30) • Managing concentration, currency, and liquidity risks • Cross-border tax planning and wealth transfer tools • Aligning investments with trust and estate strategies
- Module 2: ESG and Values-Based Investing (09:45 – 11:15) • The rise of sustainable investing among HNWIs • Incorporating ESG screens and impact metrics
- Module 3: Enhancing Client Experience and Advisory Value (11:30 – 01:00) • Delivering personalized service and advisory excellence • Measuring client satisfaction and relationship profitability
- Module 4: Final Workshop – Advisory Pitch Development (02:00 – 03:30) • Participants deliver a mock pitch and portfolio to an HNW profile

## Certification

Participants will receive a Certificate of Completion in Best Investments for High Net Worth (HNW) Investors & Private Banking, validating their ability to structure, advise, and manage investment portfolios tailored to the unique needs of HNW individuals in private wealth environments.

## Why Choose MAWA Events

- **Global Expertise:** More than 17 years of experience in professional training and consulting.
- **Industry-Leading Faculty:** Courses delivered by seasoned professionals with hands-on experience.
- **Practical Insights:** Learn to turn theory into actionable strategies for real-world business impact.
- **Client-Focused Solutions:** Customized programs designed to achieve your organisation's unique goals.

### In-House / Customized Training

Interested in running this course for your team?

Please contact us:

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