MAWA EVENTS

Address: No. 857, Block A2. Leisure Commerce Square - No 9., 46150 Petaling Jaya, Selangor, Malaysia

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FINANCIAL PLANNING – BECOMING A TRUSTED ADVISOR

“Elevating Financial Advisory Skills to Build Trust, Loyalty, and Long-Term Client Value”

Schedule

Date	Venue	Fees (Face-to-Face)
06 - 07 May 2026	Doha, Qatar	USD 1995 per delegate
08 - 09 Sep 2026	Doha, Qatar	USD 1995 per delegate

Introduction

In today’s competitive and client-centric environment, financial professionals are expected to move beyond transactional services and become trusted advisors. True advisory requires deep understanding of client needs, long-term strategic thinking, and the ability to communicate complex financial solutions in a way that builds confidence and trust.

This course equips financial planners, bankers, and wealth managers with the tools to elevate client engagement. Participants will explore best practices in relationship-building, financial needs analysis, advisory conversations, and goal-based planning. The training includes client simulations, behavioral finance insights, and coaching techniques to help professionals become indispensable partners in their clients’ financial journeys.

Objectives

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

- Position themselves as strategic financial advisors, not just product providers
- Conduct holistic client profiling and financial needs analysis
- Communicate financial strategies with clarity, trust, and empathy
- Apply behavioral finance principles to client decision-making
- Build long-term, loyal relationships through trust-based advisory

Why Attend

- Upgrade your financial advisory conversations for greater client trust
- Develop a goal-based, client-first planning approach
- Improve retention by building deeper client relationships
- Gain tools to differentiate your services in a crowded market
- Strengthen your role as a strategic partner, not a sales agent

Target Audience

This program is designed for:

- Financial planners and wealth managers
- Relationship managers in retail, private, or corporate banking
- Financial advisors and investment consultants
- Client service and portfolio management professionals
- Anyone transitioning from transactional sales to advisory roles

Individual Benefits

Key competencies that will be developed include:

- Client discovery and needs-based planning
- Building rapport, trust, and emotional connection
- Advisory conversation frameworks and planning tools
- Influencing client decisions with clarity and confidence
- Managing complex financial discussions effectively

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Increased client satisfaction, retention, and referrals
- Stronger alignment of financial advice with long-term client goals
- More consultative sales and reduced product-push pressure
- Enhanced advisory team professionalism and confidence
- Differentiation of financial services through relationship excellence

Instructional Methodology

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

- Strategy Briefings – The advisor mindset, trust-building principles, client lifecycle
- Case Studies – Real client scenarios and advisory success models
- Workshops – Conducting discovery sessions, crafting advisory proposals
- Peer Exchange – Group coaching, role-playing, and advisory dialogue practice
- Tools – Client profiling templates, needs assessment checklists, advisory scripts

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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: Foundations of Trust-Based Financial Advisory

- Module 1: Redefining the Role – From Sales to Trusted Advice (07:30 – 09:30) • Evolution of client expectations and advisor roles
- Module 2: Building Trust and Emotional Intelligence (09:45 – 11:15) • Empathy, active listening, non-verbal cues
- Module 3: Conducting Effective Discovery and Profiling (11:30 – 01:00) • Understanding client life stages, goals, and concerns
- Module 4: Workshop – Simulated Client Interview (02:00 – 03:30) • Role play and feedback on advisory dialogue

Day 2: Goal-Based Planning and Influential Communication

- Module 1: Designing Personalized Financial Plans (07:30 – 09:30) • Linking client goals to investment and protection strategies
- Module 2: Behavioral Finance and Client Decision-Making (09:45 – 11:15) • Overcoming biases, framing choices
- Module 3: Presenting Advice with Confidence and Clarity (11:30 – 01:00) • Using visual tools, storytelling, and analogies
- Module 4: Final Workshop – Presenting an Advisory Plan (02:00 – 03:30) • Group feedback and action planning

Certification

Participants will receive a Certificate of Completion in Financial Planning – Becoming a Trusted Advisor, validating their ability to deliver relationship-based financial advice that aligns with client goals and fosters long-term trust.

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	TEL:	EMAIL:
Interested in running this course for your team? Please contact us:	**+601116373203**	**info@mawaevents.net**