MAWA EVENTS

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INVESTMENT PRODUCTS FOR HIGH NET WORTH (HNW) & PRIVATE BANKING

“Designing Tailored Wealth Solutions and Building Long-Term Relationships with Affluent Clients”

Schedule

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

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

Introduction

The expectations of High Net Worth (HNW) clients continue to evolve, demanding greater sophistication, personalization, and strategic insight from private banking professionals. Delivering exceptional investment solutions requires a deep understanding of financial markets, risk tolerance, and wealth structuring tools tailored to the unique goals of affluent individuals and families.

This intensive course provides private bankers, wealth managers, and investment advisors with the knowledge and tools to effectively advise HNW clients on a broad range of investment products. Participants will explore portfolio construction, structured products, alternative investments, tax-efficient strategies, and client communication techniques that align with a trusted advisory approach.

Objectives

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

- Understand the investment preferences and risk profiles of HNW clients
- Compare and recommend traditional, alternative, and structured investment products
- Construct diversified, goal-aligned portfolios using strategic asset allocation
- Apply tax efficiency and estate planning principles in product selection
- Engage and retain HNW clients through value-added investment advisory

Why Attend

- Expand your knowledge of sophisticated investment instruments
- Build portfolios that match the complex goals of HNW individuals
- Improve your ability to position products within broader wealth strategies
- Strengthen trust and loyalty with affluent clients
- Differentiate your advisory offering in the competitive private banking market

Target Audience

This program is designed for:

- Private bankers and relationship managers
- Wealth managers and investment advisors
- Financial planners working with HNW clients
- Portfolio managers and asset management professionals
- Senior client-facing staff in private and priority banking divisions

Individual Benefits

Key competencies that will be developed include:

- Product knowledge across traditional, alternative, and structured investments
- Client segmentation and investment profiling
- Tax-sensitive portfolio structuring
- Estate planning and intergenerational wealth strategies
- Relationship management and client communication

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Improved delivery of tailored investment solutions to HNW clients
- Stronger client loyalty and reduced asset attrition
- Better integration of investment offerings within wealth planning frameworks
- Enhanced advisory credibility and client engagement quality
- Increased AUM (assets under management) and client retention

Instructional Methodology

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

- Strategy Briefings – HNW market trends, product strategies, and portfolio theory
- Case Studies – Investment planning scenarios and portfolio simulations
- Workshops – Client profiling, product selection, and solution design
- Peer Exchange – Group discussions on client challenges and success stories
- Tools – Portfolio modeling sheets, risk tolerance frameworks, and product maps

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 the HNW Client and Core Investment Products

- Module 1: HNW Client Segmentation and Wealth Goals (07:30 – 09:30) • Investor personas, life stages, and advisory needs
- Module 2: Traditional Investment Products (09:45 – 11:15) • Equities, fixed income, mutual funds, and ETFs
- Module 3: Structured Products and Capital-Protected Strategies (11:30 – 01:00) • Capital preservation, barriers, auto-callables, structured notes
- Module 4: Workshop – Profiling a HNW Client Portfolio (02:00 – 03:30) • Match investment types to goals and risk profiles

Day 2: Alternatives, Portfolio Design, and Client Advisory

- Module 1: Alternative Investments (07:30 – 09:30) • Private equity, hedge funds, REITs, and commodities
- Module 2: Portfolio Construction and Asset Allocation (09:45 – 11:15) • Modern Portfolio Theory, diversification, rebalancing
- Module 3: Tax Efficiency and Estate Planning Integration (11:30 – 01:00) • Trusts, foundations, tax-shielding vehicles
- Module 4: Final Workshop – Presenting an Investment Proposal to a HNW Client (02:00 – 03:30) • Advisory presentation simulation with group feedback

Certification

Participants will receive a Certificate of Completion in Investment Products for High Net Worth (HNW) & Private Banking, validating their ability to design, communicate, and manage sophisticated investment portfolios aligned with the needs of affluent clients.

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:	TEL: **+601116373203**	EMAIL: **info@mawaevents.net**