MAWA EVENTS

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

Phone: +601116373203 | **Email:** info@mawaevents.net

CROSS-SELLING GLOBAL MARKETS PRODUCTS IN PRIVATE BANKING

"Enhancing Client Value Through Strategic Product Integration and Advisory Excellence"

Schedule

Venue (InHouse)	Fees
At Your Organization Premises	Ask For The Quotation

► **Available delivery methods:** In-House Training

Introduction

Private banking clients demand personalized, sophisticated solutions to manage their wealth, often spanning multiple asset classes and global exposures. This training program equips relationship managers and advisors with advanced strategies to effectively cross-sell global markets products—such as FX, structured products, fixed income, and commodities—while aligning these offerings with the unique goals and risk profiles of high-net-worth individuals (HNWIs).

Participants will gain practical techniques in product suitability, holistic advisory, and compliant execution, enabling them to deepen client relationships, drive revenue, and enhance the overall client experience.

Objectives

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

- Identify suitable global markets products for HNWI clients
- Align product strategies with client goals, preferences, and risk tolerance
- Structure and present tailored multi-product solutions
- Navigate internal approval and compliance processes
- Strengthen advisory capabilities to support long-term client value

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Why Attend

- Learn how to increase wallet share through consultative cross-selling
- Stay ahead of regulatory changes impacting product recommendations
- Boost collaboration between advisory and product teams
- Gain confidence in explaining complex instruments in simple terms
- Expand your influence as a trusted private banking advisor

Target Audience

This program is designed for:

- Private Banking Relationship Managers
- Client Advisors and Wealth Managers
- Investment Product Specialists
- FX, Fixed Income, and Derivatives Sales Teams
- Compliance Officers supporting private wealth

Individual Benefits

Key competencies that will be developed include:

- Product knowledge across global markets instruments
- Client profiling and advisory excellence
- Solution design and bundling techniques
- Sales communication and negotiation skills
- Ethical selling and compliance awareness

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Improved client satisfaction and retention
- Increased product penetration and revenue per client
- Stronger advisory reputation and brand value
- Compliance with cross-border and suitability regulations
- Enhanced team collaboration across banking units

Instructional Methodology

The course uses a balanced and interactive learning model:

- Case-Based Instruction – Analysis of real-world client scenarios
- Simulation Exercises – Practice advisory and pitching sessions
- Interactive Workshops – Product structuring and risk evaluation
- Peer Learning – Group collaboration and discussion
- Expert Guidance – Sessions led by seasoned private bankers and market experts

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Course Outline

DETAILED 5-DAY COURSE OUTLINE (Customizable)

Training Hours: 07:30 AM – 03:30 PM Daily Format: 3–4 Modules | Breaks: 09:30 & 11:15 | Lunch: 01:00 – 02:00

Day 1: Private Banking & Client Needs Landscape

- Module 1: Understanding Private Banking Client Profiles (07:30 – 09:30)
- HNWI goals, life stages, and investment drivers
- Risk tolerance and behavior-based segmentation
- Client discovery and profiling best practices
- Module 2: Introduction to Global Markets Products (09:45 – 11:15)
- FX, fixed income, equity-linked, and commodity products
- Benefits and risks from a private banking perspective
- Case examples from real portfolios
- Module 3: The Art of Cross-Selling (11:30 – 01:00)
- Identifying needs through conversations
- Uncovering latent opportunities
- Suitability vs. sales performance balance

Day 2: Structuring Solutions for HNWI Clients

- Module 4: Product Bundling Strategies (07:30 – 09:30)
- Combining FX, structured products, and funds
- Using leverage and hedging judiciously
- Profitability vs. suitability
- Module 5: Portfolio Impact and Scenario Analysis (09:45 – 11:15)
- Stress-testing proposed product sets
- Diversification and risk mitigation
- Visual tools for client communication
- Module 6: Client Pitch Preparation (11:30 – 01:00)
- Communicating complex ideas clearly
- Customizing pitches based on client knowledge level
- Interactive role-play and feedback

Day 3: Advanced Advisory & Sales Techniques

- Module 7: Building Trust through Value-Based Advisory (07:30 – 09:30)
- Behavioral finance in client decision-making
- Emotional intelligence in sales conversations
- Long-term relationship building
- Module 8: Overcoming Objections (09:45 – 11:15)
- Addressing product concerns
- Managing expectations for returns and risk
- Compliance-aligned response frameworks
- Module 9: Ethics and Transparency in Cross-Selling (11:30 – 01:00)
- Avoiding mis-selling
- Documentation, disclosure, and follow-up
- Case studies of regulatory breaches and lessons

Day 4: Governance and Internal Execution

- Module 10: Regulatory and Suitability Requirements (07:30 – 09:30)
- Global and local frameworks: MiFID II, FATCA, CRS
- Suitability questionnaires and documentation
- Cross-border restrictions
- Module 11: Internal Approval and Monitoring (09:45 – 11:15)
- Navigating product desk, compliance, and risk teams
- Client reporting and post-trade monitoring
- Red flags and escalation
- Module 12: Risk Controls in Advisory (11:30 – 01:00)
- Managing leverage and margin products
- Aligning risk appetite with product mix
- Rebalancing and lifecycle management

Day 5: Client Simulation & Presentation

- Module 13: Client Advisory Simulation (07:30 – 09:30)
- Conducting a full client meeting simulation
- Preparing tailored recommendations
- Peer and trainer evaluation
- Module 14: Group Presentations and Strategy Sharing (09:45 – 11:15)
- Team case presentations
- Discussion of applied cross-sell strategies
- Feedback and improvement tips
- Module 15: Wrap-Up and Action Planning (11:30 – 01:00)
- Final Q&A session
- Personal growth commitments
- Issuance of certificates

Certification

Participants will receive a Certificate of Completion in Cross-Selling Global Markets Products in Private Banking, validating their expertise in delivering customized, compliant, and strategic product solutions for private 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**

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