

CROSS-SELLING GLOBAL MARKETS PRODUCTS TO CUSTODIANS & TRUSTS

“Empowering Institutional Engagement through Strategic Product Structuring and Advisory”

Schedule

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

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

Introduction

Custodians and trust structures are pivotal institutional participants in financial markets, requiring tailored solutions across global asset classes. This course is designed to equip sales and relationship professionals with the knowledge and advisory skills needed to strategically cross-sell global markets products to these sophisticated entities. The program integrates technical product insights with institutional structuring, regulatory considerations, and cross-border execution nuances, ensuring participants are positioned to deliver high-impact, compliant, and value-driven solutions.

Objectives

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

- Understand the roles and mandates of custodians and trusts
- Match global market products to institutional investment objectives
- Structure bespoke offerings across FX, fixed income, and derivatives
- Navigate regulatory and operational complexities
- Build high-trust relationships with institutional counterparties

Why Attend

- Learn to position products that align with trust and custody structures
- Enhance institutional wallet share through integrated advisory
- Understand the evolving regulatory landscape affecting these entities
- Master client communication for fiduciary-driven organizations
- Gain competitive advantage through structured product design

Target Audience

This program is designed for:

- Institutional Sales Professionals
- Relationship Managers (Custody, Trust, and Family Office)
- Product Structuring Teams
- Investment Advisors and Portfolio Consultants
- Legal, Compliance & Fiduciary Officers

Individual Benefits

Key competencies that will be developed include:

- Structuring market-linked strategies for custodial mandates
- Presenting investment ideas aligned with fiduciary responsibilities
- Applying compliance knowledge in institutional advisory
- Strengthening technical sales capabilities
- Building durable, long-term trust-based relationships

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Increased penetration into custody and trust accounts
- Higher revenue per institutional client
- Reduced compliance risks through proper suitability alignment
- Elevated institutional advisory standards
- Broader collaboration between markets and fiduciary teams

Instructional Methodology

The course incorporates:

- Real-Life Case Studies – Institutional client scenarios and product usage
- Interactive Simulations – Sales pitches and negotiation role-plays
- Practical Workshops – Product bundling and regulatory exercises
- Expert-Led Sessions – Delivered by ex-institutional bankers and legal advisors
- Collaborative Activities – Group challenges and peer learning

MAWA EVENTS

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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: Understanding Institutional Clients

- Module 1: Custodians & Trust Structures - Roles & Investment Mandates (07:30 - 09:30)
 - Key functions of custodians and trustees
 - Investment objectives and risk frameworks
 - Understanding mandates and limitations
- Module 2: Mapping Global Market Product Needs (09:45 - 11:15)
 - Common products used by custodians & trusts
 - FX hedging, fixed income, structured deposits
 - Suitability mapping by client category
- Module 3: Regulatory Frameworks & Fiduciary Duties (11:30 - 01:00)
 - Compliance, AML, and cross-border issues
 - Role of the fiduciary and impact on product use
 - Global frameworks: FATCA, CRS, MiFID II

Day 2: Product Strategy and Design

- Module 4: Structuring Multi-Product Solutions (07:30 - 09:30)
 - Combining FX, rates, credit, and alternatives
 - Designing solutions for yield and risk management
 - Customization within mandate restrictions
- Module 5: Operational Mechanics in Custody & Trust Execution (09:45 - 11:15)
 - Trade flow, booking, and settlement
 - Integration with fund accounting and valuation
 - Managing execution risk
- Module 6: Institutional Reporting and Product Documentation (11:30 - 01:00)
 - Term sheets, ISDA, and regulatory disclosures
 - Client reporting for trustees and fiduciaries
 - Case examples of deal structuring

Day 3: Advanced Advisory and Cross-Selling Skills

- Module 7: Consultative Selling to Institutional Clients (07:30 - 09:30)
 - Identifying product gaps and unmet needs
 - Crafting cross-sell proposals
 - Aligning value to institutional KPIs
- Module 8: Risk Conversations with Custodians and Trustees (09:45 - 11:15)
 - Articulating downside protection and risk-return tradeoffs
 - Understanding internal approval processes
 - Avoiding misrepresentation
- Module 9: Cross-Border & Tax Considerations (11:30 - 01:00)
 - Impact of domicile, structure, and tax treaties
 - Currency and regulatory arbitrage
 - Lessons from international trust structures

Day 4: Governance, Execution & Relationship Management

- Module 10: Legal & Risk Controls in Institutional Advisory (07:30 – 09:30)
 - Internal approvals, compliance gates, and conflicts of interest
 - Documenting recommendations
 - Role of compliance in cross-selling
- Module 11: Account Management and Strategic Planning (09:45 – 11:15)
 - Long-term account planning for trusts and custody clients
 - Relationship tiering and touchpoint mapping
 - Performance tracking and reporting
- Module 12: Handling Complex Institutional Scenarios (11:30 – 01:00)
 - Dealing with layered client structures (e.g., family offices + trust)
 - Institutional objections and workarounds
 - Best practices from leading firms

Day 5: Application & Execution Simulation

- Module 13: Product Advisory Simulation (07:30 – 09:30)
 - Full advisory meeting simulation with institutional client
 - Team collaboration in product presentation
 - Peer and trainer evaluations
- Module 14: Pitch Presentations & Strategy Wrap-Up (09:45 – 11:15)
 - Final group presentations
 - Assessment of applied advisory techniques
 - Open feedback and discussion
- Module 15: Summary, Feedback & Certificate Ceremony (11:30 – 01:00)
 - Recap and learning reflection
 - Personal action plans
 - Award of certificates

Certification

Participants will receive a Certificate of Completion in Cross-Selling Global Markets Products to Custodians & Trusts, recognizing their advanced capabilities in advisory, product structuring, and institutional relationship management.

Why Choose MAWA Events

- **Global Expertise:** More than 17 years of experience in professional training and consulting.
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- **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?

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