MAWA EVENTS

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CROSS-SELLING GLOBAL MARKETS SOLUTIONS IN PRIVATE BANKING

"Strategic Product Positioning for High-Net-Worth Clients"

Schedule

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

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

Introduction

Private bankers increasingly face pressure to deliver sophisticated global markets solutions that go beyond traditional portfolio offerings. This course is designed to equip wealth managers, investment advisors, and relationship professionals with the expertise to effectively cross-sell FX, fixed income, structured products, and alternative investments tailored to the specific needs of high-net-worth individuals (HNWIs). Participants will learn how to integrate market insights, client profiling, and regulatory understanding to deliver bespoke solutions that elevate client engagement and increase share of wallet.

Objectives

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

- Understand the strategic product needs of private banking clients
- Match market solutions to wealth management objectives
- Develop cross-asset proposals aligned with risk profiles
- Navigate suitability, compliance, and documentation in advisory sales
- Build long-term, value-driven client relationships through product strategy

Why Attend

- Learn practical cross-selling approaches tailored for private banking
- Understand how to build a product suite for HNWI client segments
- Master advisory-based selling aligned with market opportunities
- Increase wallet share through effective product integration
- Gain confidence in pitching structured, fixed income, and FX products

Target Audience

This program is designed for:

- Private Bankers and Wealth Managers
- Investment Advisors
- Relationship Managers in Private and Priority Banking
- Product Specialists and Portfolio Consultants
- Financial Planning and Structured Product Teams

Individual Benefits

Key competencies that will be developed include:

- Developing cross-asset product advisory capabilities
- Enhancing communication with HNW and UHNW clients
- Structuring client-centric proposals using global market tools
- Understanding private client needs and behavioral finance triggers
- Building long-term trust and financial influence with clients

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Increased client retention and deepened relationships
- Enhanced revenue per relationship through structured cross-sell
- Reduced regulatory and product risk via informed advisory
- Improved collaboration between markets and relationship teams
- Institutional reputation building via skilled client interaction

Instructional Methodology

The course incorporates:

- Live Case Studies – Real private banking client scenarios
- Product Pitch Simulations – HNW and UHNW mock sessions
- Advisory Workshops – Risk profiling and product fit exercises
- Trainer Insights – Industry best practices and personal experience
- Collaborative Discussions – Peer learning and interactive problem-solving

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: The Private Banking Product Landscape

- Module 1: HNWI Client Profiling & Wealth Objectives (07:30 – 09:30)
- Understanding private client personas
- Asset allocation models and behavioral biases
- Defining risk appetite and investment goals
- Module 2: Overview of Global Market Solutions (09:45 – 11:15)
- FX, fixed income, structured notes, and alternatives
- Key drivers and use cases for each product type
- Relevance to private portfolios
- Module 3: Role of the Private Banker in Product Strategy (11:30 – 01:00)
- Advisory versus execution roles
- Client communication and education
- Managing expectations and portfolio fit

Day 2: Product Knowledge & Suitability

- Module 4: FX & Interest Rate Products in Wealth Advisory (07:30 – 09:30)
- FX forwards, swaps, and structured currency products
- Interest rate views and curve strategies
- Risk management for private clients
- Module 5: Fixed Income & Credit Strategies (09:45 – 11:15)
- Yield products, credit ratings, and bond ladders
- High-yield, investment-grade, and subordinated debt
- Inflation-linked and ESG bonds
- Module 6: Structured Products & Derivatives for HNWIs (11:30 – 01:00)
- Capital protection, yield enhancement, and participation products
- Option-based structures: reverse convertibles, autocallables
- Risk disclosures and suitability frameworks

Day 3: Integration & Customization for Client Portfolios

- Module 7: Building Multi-Product Proposals (07:30 – 09:30)
- Case-based advisory proposals
- Layering FX, structured and fixed income views
- Modular portfolio solutions
- Module 8: Behavioral Finance in Private Banking Sales (09:45 – 11:15)
- How HNWIs make investment decisions
- Emotional triggers and sales techniques
- Overcoming decision paralysis
- Module 9: Compliance & Documentation (11:30 – 01:00)
- Suitability assessments and advisory records
- Cross-border sales and tax considerations
- Communication controls and product due diligence

Day 4: Practical Sales Skills for Cross-Selling

- Module 10: Consultative Selling in Private Banking (07:30 – 09:30)
- Conversation sequencing and product introduction timing
- Identifying life-event triggers and transition planning
- Positioning high-value solutions
- Module 11: Client Engagement & Objection Handling (09:45 – 11:15)
- Handling performance-related queries
- Educating clients on complexity and structure
- Closing cross-sell opportunities
- Module 12: Market Insight Integration (11:30 – 01:00)
- Translating macro trends into advisory strategy
- Tactical product rotation aligned with volatility
- Sample market-based proposals

Day 5: Application & Certification

- Module 13: Client Advisory Simulation (07:30 – 09:30)
- Delivering a full cross-sell pitch to a mock client
- Structuring the conversation and product justification
- Group and trainer feedback
- Module 14: Proposal Presentations & Wrap-Up (09:45 – 11:15)
- Group-based product proposals
- Peer evaluation and refinement
- Key takeaways and improvement focus
- Module 15: Personal Development Planning & Certification (11:30 – 01:00)
- Building your cross-sell success plan
- Trainer coaching
- Course certificate ceremony

Certification

Participants will receive a Certificate of Completion in Cross-Selling Global Markets Solutions in Private Banking, validating their advanced knowledge of product strategy, client advisory, and private banking sales.

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**