MAWA EVENTS

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

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

WEALTH MANAGEMENT BEST PRACTICES FOR HIGH NET WORTH INDIVIDUALS

“Proven Strategies to Preserve, Grow, and Transfer Wealth Across Generations”

Schedule

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

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

Introduction

High net worth individuals (HNWIs) face unique challenges in managing and preserving their wealth. From complex tax planning and global investment diversification to legacy planning and philanthropy, wealth management for HNWIs requires a multidisciplinary and strategic approach. This course provides financial professionals with the frameworks, tools, and best practices necessary to serve affluent clients with excellence and discretion. Emphasis is placed on practical solutions, case studies, and the integration of wealth structuring, behavioral finance, and family governance

Objectives

Participants will learn to:

- Develop customized wealth management plans for HNW clients
- Understand the psychology and unique needs of wealthy individuals and families
- Optimize tax-efficient investment strategies across jurisdictions
- Structure succession and estate planning across generations
- Manage multi-jurisdictional risks and regulatory frameworks

Why Attend

- Learn practical, elite-level wealth strategies used by leading global private banks
- Understand how to build and retain trust with affluent individuals and families
- Gain confidence in structuring portfolios that preserve capital while meeting lifestyle needs
- Benchmark your services against global family office and UHNW advisory standards
- Enhance your value as a trusted wealth advisor or private banker

Target Audience

- Private Bankers & Relationship Managers
- Independent Wealth Advisors and CFPs
- Asset Managers and Portfolio Consultants
- Tax Advisors and Estate Planners
- Family Office Professionals

Individual Benefits

- Gain confidence in advising clients on complex, high-value portfolios
- Learn techniques to address succession and family governance challenges
- Enhance your credibility with elite clientele through knowledge of global best practices
- Build soft skills for client engagement, discretion, and long-term relationship management

Organizational Benefits

- Expand capabilities to attract and retain HNW/UHNW clients
- Mitigate risk exposure through compliance-aligned structuring
- Improve client retention and referral opportunities through value-added services
- Strengthen cross-disciplinary advisory teams (legal, tax, investment) for premium client service

Instructional Methodology

- Real-life HNWI case studies and client profiling
- Investment and estate planning simulations
- Interactive workshops on portfolio structuring and family dynamics
- Peer sharing, group discussions, and scenario mapping
- Tools and templates for client advisory practices

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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 | Coffee breaks: 09:30 & 11:15 | Lunch Buffet: 01:00 – 02:00

Day 1: Foundations of Wealth Management

- Module 1 (07:30 – 09:30): Understanding the HNWI Profile & Wealth Lifecycle
- Module 2 (09:45 – 11:15): Core Principles of Wealth Preservation & Growth
- Module 3 (11:30 – 01:00): Regulatory and Tax Considerations Across Jurisdictions

Day 2: Investment Planning and Portfolio Structuring

- Module 4 (07:30 – 09:30): Strategic Asset Allocation for HNW Clients
- Module 5 (09:45 – 11:15): Alternative Investments, Private Equity, and Impact Funds
- Module 6 (11:30 – 01:00): Portfolio Risk Management & Performance Reporting

Day 3: Estate Planning and Succession Strategies

- Module 7 (07:30 – 09:30): Trusts, Wills, and Wealth Transfer Vehicles
- Module 8 (09:45 – 11:15): Multigenerational Planning and Family Governance
- Module 9 (11:30 – 01:00): Cross-Border Estate Planning and Tax Optimization

Day 4: Private Banking, Philanthropy & Family Offices

- Module 10 (07:30 – 09:30): Structuring and Managing a Single or Multi-Family Office
- Module 11 (09:45 – 11:15): Integrating Philanthropy and Impact Investing
- Module 12 (11:30 – 01:00): Managing Lifestyle Assets: Art, Aircraft, Yachts, and Real Estate

Day 5: Relationship Management and Practice Development

- Module 13 (07:30 – 09:30): Behavioral Finance & Emotional Intelligence in Client Relations
- Module 14 (09:45 – 11:15): Ethical and Confidentiality Standards in HNW Advisory
- Module 15 (11:30 – 01:00): Advisory Practice Toolkit, Certification & Closing

Certification

Participants will receive a Certificate of Completion titled: “Wealth Management Best Practices for High Net Worth Individuals”, validating expertise in strategic wealth planning and HNW client service delivery.

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**