

WEALTH MANAGEMENT FOR HIGH NET WORTH INDIVIDUALS

“Strategic Solutions 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

Wealth management for high net worth individuals (HNWIs) involves more than just investment strategies. It requires a comprehensive, tailored approach that addresses portfolio construction, tax efficiency, estate planning, risk management, philanthropy, and legacy structuring. This course provides participants with a solid foundation in managing and advising affluent individuals and families. Through case studies, simulation-based exercises, and global best practices, participants will learn how to build trusted client relationships while delivering long-term value.

Objectives

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

- Understand the financial needs and behaviors of HNW individuals
- Structure and manage diversified investment portfolios aligned with wealth goals
- Integrate tax planning and asset protection techniques
- Navigate cross-border estate planning and succession challenges
- Deliver value-added services including philanthropy and family governance
- Position themselves as trusted advisors to affluent clients

Why Attend

- Gain a 360-degree view of the needs and expectations of wealthy clients
- Learn how to create tax-efficient, long-term wealth management strategies
- Explore real-world challenges in multi-generational wealth planning
- Enhance your capabilities in dealing with emotional, legal, and financial complexities of family wealth
- Build your advisory credibility in an increasingly competitive wealth management environment

Target Audience

- Private bankers and wealth advisors
- Financial planners and family office professionals
- Investment and portfolio managers
- Tax and estate planning consultants
- Senior client relationship managers
- Legal and fiduciary professionals

Individual Benefits

- Learn how to structure holistic financial plans for HNWI clients
- Enhance your advisory skills in succession, philanthropy, and alternative investing
- Expand your understanding of family office operations and cross-border issues
- Improve communication with clients across generations and cultures

Organizational Benefits

- Strengthen your firm's positioning with affluent and ultra-affluent segments
- Reduce client attrition by offering advanced advisory capabilities
- Support cross-functional collaboration between investment, legal, and tax units
- Develop staff with the soft and technical skills needed to manage elite client relationships

Instructional Methodology

- Case studies based on real HNWI client scenarios
- Simulation exercises for estate planning and portfolio structuring
- Group work on family governance and intergenerational issues
- Interactive lectures and peer discussions
- Toolkit of templates, planning checklists, and diagnostic tools

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): Introduction to the HNWI Landscape and Wealth Lifecycle
- Module 2 (09:45 – 11:15): Core Principles of Asset Preservation and Growth
- Module 3 (11:30 – 01:00): Tax Considerations and Regulatory Landscapes for HNWIs

Day 2: Investment Management for the Wealthy

- Module 4 (07:30 – 09:30): Strategic Asset Allocation & Portfolio Construction
- Module 5 (09:45 – 11:15): Alternative Investments, Real Assets, and Private Equity
- Module 6 (11:30 – 01:00): Portfolio Risk Management and Behavioral Biases

Day 3: Estate Planning and Succession

- Module 7 (07:30 – 09:30): Global Trusts, Foundations, and Wealth Transfer Tools
- Module 8 (09:45 – 11:15): Succession Planning and Family Business Dynamics
- Module 9 (11:30 – 01:00): Cross-Border Estate Planning & Compliance

Day 4: Lifestyle Wealth & Family Governance

- Module 10 (07:30 – 09:30): Managing Luxury Assets: Real Estate, Art, Yachts, Planes
- Module 11 (09:45 – 11:15): Family Office Setup, Operations, and Outsourcing Models
- Module 12 (11:30 – 01:00): Philanthropy, ESG, and Impact Investing for HNWIs

Day 5: Communication, Ethics, and Certification

- Module 13 (07:30 – 09:30): Client Psychology & Emotional Intelligence
- Module 14 (09:45 – 11:15): Ethics, Confidentiality, and Long-Term Trust Building
- Module 15 (11:30 – 01:00): Final Simulation, Action Planning & Certification Ceremony

Certification

Upon completion of the course, participants will be awarded a Certificate of Achievement in “Wealth Management for High Net Worth Individuals”, signifying practical competence in elite-level client wealth strategy.

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?

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