

# WEALTH MANAGEMENT THROUGH FINANCIAL INSTRUMENTS

*“Harnessing the Power of Financial Instruments to Build, Preserve, and Grow Wealth”*

## Schedule

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

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

## Introduction

In the evolving landscape of private wealth, understanding and leveraging financial instruments is essential for effective wealth management. This course equips professionals with deep knowledge of how financial instruments—such as equities, bonds, derivatives, mutual funds, ETFs, structured products, and alternative assets—can be strategically used to meet diverse wealth goals. Through real-world case studies and interactive simulations, participants will learn how to design and implement sophisticated investment portfolios tailored to high-net-worth individuals (HNWIs) and institutional needs.

## Objectives

Participants will be able to:

- Understand the key financial instruments used in wealth management
- Evaluate risk-return profiles of various asset classes and instruments
- Construct diversified, goal-oriented portfolios for different wealth stages
- Apply financial instruments for income generation, capital appreciation, and hedging
- Integrate structured and alternative products for enhanced portfolio performance
- Navigate regulatory and tax considerations in instrument selection

## Why Attend

- Master how different financial instruments contribute to long-term wealth strategies
- Learn to match instruments to client risk profiles and financial objectives
- Gain hands-on experience building and stress-testing portfolios
- Discover innovations in structured products and impact investing
- Improve your ability to communicate complex instrument strategies to clients

## Target Audience

- Wealth managers and private bankers
- Financial advisors and investment consultants
- Portfolio managers and fund analysts
- Relationship managers and client advisors
- Finance professionals moving into wealth advisory roles

## Individual Benefits

- Deepen your expertise in market-based financial products
- Gain confidence in recommending suitable instruments to clients
- Learn to build customized portfolios for income, growth, or preservation
- Develop advisory credibility in competitive wealth management markets

## Organizational Benefits

- Enhance the sophistication of investment advisory services
- Deliver higher value to affluent and institutional clients
- Improve team knowledge in financial engineering and client portfolio structuring
- Ensure alignment with global regulatory, tax, and product standards

## Instructional Methodology

- Interactive case studies and group portfolio design
- Simulation-based trading exercises with real-time feedback
- Expert-led lectures with supporting tools and templates
- Peer collaboration, scenario-based analysis, and live Q&A
- Step-by-step model portfolio construction and stress testing

## 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: Core Financial Instruments in Wealth Management

- Module 1 (07:30 – 09:30): Overview of Financial Instruments: Types, Structures, Uses
- Module 2 (09:45 – 11:15): Equities, Fixed Income, and Hybrids in Client Portfolios
- Module 3 (11:30 – 01:00): Money Market Instruments and Liquidity Planning

### Day 2: Mutual Funds, ETFs & Structured Products

- Module 4 (07:30 – 09:30): Open-End vs Closed-End Funds, ETF Mechanics & Strategies
- Module 5 (09:45 – 11:15): Selecting Mutual Funds for Income & Growth
- Module 6 (11:30 – 01:00): Structured Products: Capital Protection, Yield Enhancement

### Day 3: Derivatives and Risk-Managed Wealth Strategies

- Module 7 (07:30 – 09:30): Options and Futures in Wealth Management
- Module 8 (09:45 – 11:15): Hedging Currency, Interest Rate, and Market Risks
- Module 9 (11:30 – 01:00): Building Risk-Controlled Portfolios Using Derivatives

### Day 4: Alternative Assets & Wealth Diversification

- Module 10 (07:30 – 09:30): Private Equity, Hedge Funds, and Real Estate Instruments
- Module 11 (09:45 – 11:15): ESG and Impact Investments in HNWI Portfolios
- Module 12 (11:30 – 01:00): Portfolio Diversification and Allocation Techniques

### Day 5: Simulation, Client Planning & Certification

- Module 13 (07:30 – 09:30): Client Case Study: Instrument Selection & Portfolio Goals
- Module 14 (09:45 – 11:15): Live Simulation: Building a Multi-Instrument Portfolio
- Module 15 (11:30 – 01:00): Presentation, Feedback, and Certification Ceremony

## Certification

Participants will receive a Certificate of Completion in “Wealth Management Through Financial Instruments,” signifying their ability to design and manage sophisticated investment strategies using market instruments.

## Why Choose MAWA Events

- **Global Expertise:** More than 17 years of experience in professional training and consulting.
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| <b>In-House / Customized Training</b><br>Interested in running this course for your team?<br>Please contact us: | TEL:<br><br><b>+601116373203</b> | EMAIL:<br><br><b>info@mawaevents.net</b> |
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