Presents

Wealth Management Capsule

Background

An integrated approach to identify, acquire and maintain wealth customers by offering banking products & delightful services besides suggesting investment solutions based on risk profile of the customers. Diversification of risk by carrying out asset allocation in order to provide market linked optimized returns.

Wealth management combines both financial planning and specialized financial services, including personal retail banking services, estate planning, legal and tax advice, and investment management services.

Having regard to above, two day training programme on “Wealth Management” has been designed aiming to educate the Relationship Managers for Liabilities, Retail Assets & Investments working in banks and financial institutions.

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Program Details

Duration	2 Days
Level	Upto Mid Level
Target Audience	Relationship Managers for Liabilities, Retail Assets & Investments
Program Takeaways	• To become one-stop-financial-shop for the Wealth Customers • Extending Banking, Investment & Lifestyle Privileges to the Wealth Customers
Contents	• Overview of Wealth Management • Customer Profiling • Customer Acquisition • Relationship Management • Cross-sell, up-sell & down-sell • Selling Third Party Products • Managing Personal Finance • Global Best Practices & Wealth Management Products • CRM Software Solution
Program delivery	Lecture, Discussion/interaction, case-studies & Powerpoint Presentation
Date, Time & Venue	24th & 25th January 2019 9:30am to 5:00pm NBI Hall, Kathmandu
Facilitator/s	**Deepak Pande, CFP, MBA, M.Sc. & CAIIB** **Former Senior Vice President, Axis Bank** An IIMI graduate, Certified Financial Planner, Guest Faculty and Senior Banking, Finance & Investment Professional, having more than 32 years of enriching experience in Retail Banking, Wealth Management, Relationship Management, Financial Products & Financial Planning. Designed the Financial Literacy Program, in order to spread awareness about Financial Planning and Managing Personal Finance. Conducting Investor meets for Retail Investors, and arranging presentation for Employees of Corporate on Economic Outlook, Financial Planning and Managing Personal Finance.