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COURSE BROCHURE

Private Banking Client Advisory and Wealth Planning Training Course

18 – 22 July 2027
Doha

Private Banking Client Advisory and Wealth Planning Training Course

Ref: 2262_84025 **Date:** 18 – 22 July 2027 **Location:** Doha **Fees:** 5500 GBP

Private Banking Client Advisory and Wealth Planning is a 1-week training course for relationship managers and private bankers, who leave with a Client Wealth Plan and Service Blueprint for one priority household. Wealthy families now expect advice that joins investments, liquidity, succession and lending in one conversation, while suitability scrutiny rises with every proposal. Jupiter Prime Training delivers this private banking client advisory and wealth planning course.

Why Private Banking Client Advisory and Wealth Planning Matters Now

Three pressures now reshape how private banking advice is given. Heirs compare their bank with digital platforms, founders want succession planned early, and suitability rules expect every recommendation to trace back to a documented risk profile. A bank advising across a family's whole balance sheet keeps assets through generations; one that only sells products loses them when heirs inherit. The course rests on goals-based wealth planning, the know-your-client KYC profile and the investment policy statement IPS as the record of each mandate.

Who Gains Most from Private Banking Client Advisory and Wealth Planning

- Relationship managers who own the household relationship and its annual review
- Private bankers who build portfolio proposals and explain them to clients
- Investment advisers who translate house views into suitable allocations
- Credit and lending specialists who structure Lombard and property loans for wealthy clients
- Service and onboarding staff who keep client files, risk profiles and mandates current

A private banking desk gains most when relationship managers and their investment specialists attend together and agree one advice process.

Private Banking Client Advisory and Wealth Planning Capabilities

Participants turn a family's assets, goals and constraints into documented, suitable advice.

- Assess a household balance sheet, cash needs and life events — the discovery meeting
- Calibrate risk tolerance and risk capacity in one client profile — suitability sign-off
- Build a goals-based portfolio proposal with clear fee disclosure — the client decision
- Design liquidity, lending and protection options around concentrated holdings — founder clients
- Specify succession and family governance steps with external advisers — heirs and trustees
- Communicate a tiered service model and review calendar — desk capacity planning

Key Private Banking Client Advisory and Wealth Planning Terms

- Suitability — the test that a recommendation fits the client's objectives, knowledge, financial position and risk profile.
- Risk capacity — the loss a client can absorb without harming goals, set apart from the loss they feel willing to accept.
- Goals-based allocation — splitting wealth into buckets for spending, growth and legacy, each with its own horizon and risk level.
- Lombard loan — a credit line secured on a client's liquid portfolio, often used to fund opportunities without selling assets.
- Family charter — a written agreement on how a family owns, governs and passes on shared wealth and businesses.
- Share of wallet — the portion of a client's total investable wealth held or advised by one bank.

Private Banking Client Advisory and Wealth Planning Day by Day

Day 1: The Wealthy Client and the Advice Relationship

- Client Segmentation By Wealth Source And Complexity — Where Advice Effort Goes
- Household Balance Sheet Mapping — Seeing Assets, Debts And Hidden Exposures
- Discovery Interview Technique — Uncovering Goals, Values And Life Events
- Know-Your-Client File And Source Of Wealth Evidence — Onboarding Readiness
- Share Of Wallet Diagnosis — Growth Potential In Existing Relationships

Day 2: Suitability and Risk Profiling

- Risk Tolerance Questionnaire Design — Reliable Inputs For Allocation Choices
- Risk Capacity Versus Willingness Analysis — Resolving Profile Conflicts With Clients
- Product Complexity And Client Knowledge Matching — Which Instruments Fit Whom
- Suitability Report Writing — Evidence Trail For Each Recommendation
- Vulnerable And Elderly Client Safeguards — Protecting Clients And The Bank

Day 3: Portfolio Proposals and Wealth Solutions

- Goals-Based Allocation Buckets — Matching Horizons To Spending And Legacy
- Discretionary Versus Advisory Mandate Choice — Who Decides Each Trade
- Concentrated Stock And Business Holdings — Diversifying Founder Wealth Over Time
- Lombard And Property Lending Structures — Liquidity Without Forced Sales
- Fee Transparency And Cost Illustration — Building Trust In The Proposal

Day 4: Succession, Family Governance and Service Design

- Wealth Transfer And Succession Mapping — Preparing Heirs And Trustees
- Family Charter And Family Council Basics — Decisions Across Generations
- Coordination With Lawyers, Tax Advisers And Trustees — Joint Planning Roles
- Tiered Service Model And Contact Calendar — Desk Coverage By Segment
- Annual Review Meeting Structure — Rebalancing And Re-Profiling Clients

Day 5: Practising the Client Wealth Plan

- Family Case Discovery And Balance Sheet — Applying Day 1 Mapping
- Case Risk Profile And Suitability Note — Applying Day 2 Methods
- Case Portfolio And Lending Proposal — Applying Day 3 Solutions
- Client Presentation Role Play — Handling Objections On Fees And Risk
- Client Wealth Plan And Service Blueprint — Final Draft For The Household

Applying Private Banking Client Advisory and Wealth Planning After the Course

- Re-profile five priority households with the risk capacity method and update their suitability notes.
- Map succession needs across the top client book and schedule family meetings with trusted external advisers.

Private Banking Client Advisory and Wealth Planning Questions FAQ

What is private banking client advisory and wealth planning, and why does it matter now?

It is advising wealthy families across investments, lending and succession under one documented plan. It matters now because heirs and suitability rules expect joined-up, traceable advice.

Which roles gain most from private banking client advisory and wealth planning training?

Relationship managers and private bankers gain most, followed by investment advisers and lending specialists.

How does private banking client advisory and wealth planning differ from a portfolio management course?

It starts from the family, not the portfolio. A portfolio management course builds and measures portfolios, while this one profiles clients, tests suitability and plans lending and succession around their goals.

What do you bring back from private banking client advisory and wealth planning training?

You bring back a wealth plan for one household, with a risk profile, proposal, succession steps and service calendar.

Private Banking Client Advisory and Wealth Planning: The Way Forward

The Client Wealth Plan and Service Blueprint first informs the proposal a relationship manager puts to one priority household. Relationship managers and specialists use it to give the family one view of its wealth. After the first annual review, revisit whether risk capacity was set correctly and whether the service tier matched the time the family needed.