# 2023 Training

KingsThrones
RC 669993

**February 22-23** **9:00am to 3:00pm**

**Private Wealth Management (On-line)**

This programme focuses on the growing trends in the global private wealth sector to bring much more clarity in the standards and practices therein to delegates. The current opportunities for private wealth managers to grow their business is enormous as they are best positioned to help individual investors seek the benefits as well as navigate the complexities of financial markets. This 2-day course begins with the robust introduction to the process of designing and executing an investment plan or strategy for the individual investor and follows up with the key tools and techniques used by private wealth managers in successfully interacting with the client to serve the client's needs.

**Day 1**

1. Introduction: Understanding The Universe of Investor Groups;
2. Setting Investor Goals and Objectives;
3. Investor Personal & Risk Profiling (including tax considerations);
3. Investment Planning – Investor Capital Sufficiency and Strategic Asset Allocation;
4. Preparing The Ideal Investment Policy Statement – IPS;
5. Inter-Generational Wealth Transfers – Managing Client Expectations (I).

**Day 2**

**Managing Client Expectations (II)**

1. Manager Selection and The Due Diligence Process;
2. Portfolio Reporting and Review;
3. Evaluating The Success of An Investment Program (II);
4. Ethical and Compliance Considerations and
5. Contextual Opportunities in Private Wealth Management.

**Please NOTE**: Link to Zoon Training Room will be sent to registered delegates 24 hours before start time.

This Course is also available on demand and in-person subject to further terms and conditions.

Training is open to all interested stakeholders in the industry: Asset Owners, Investment Advisers & Managers, Analysts and Regulators, etc.

**Course Fee: NGN97,000.00 (inclusive of Taxes)**

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