



معهد الدراسات المصرفية
INSTITUTE OF BANKING STUDIES

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The London Institute
of Banking & Finance



Certified Bank Wealth Manager Program - CBWM

Date: 26/3/2023 - 5/4/2023

Training Department
Institute of Banking Studies, Kuwait





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Program Overview

Wealth Management is a notoriously fast-paced environment, and to succeed it is essential to master Wealth & Investment Management techniques and develop solutions to help High Net Worth (HNW) Customers preserve and grow their wealth. The program covers the fundamentals of financial planning, private client portfolio management, investment advisory and analysis. This program builds over the Relationship Management knowledge acquired by participants at the Certified Bank Relationship Manager- CBRM with a deep coverage of assets and investment products available in the market as they will gain knowledge to provide appropriate solutions to meet investment, retirement and protection planning needs for their clients. The turmoil in the financial markets demonstrates the need for robust solutions to help clients withstand market volatility and preserve their wealth. The program meets the needs of the banks who want to ensure that their Relationship Team is able to provide top quality financial advice to high net worth / Ultra high net worth customers.



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Program Objectives

This Program will assist participants to:

- Gain the necessary Investment and Product knowledge and capabilities for their role.
- Understand the main characteristics of equities, fixed income, derivatives and Shariah Compliant products.
- Critically analyze and value equity, fixed income and derivatives securities.
- Master the investment management process, methods of trade and portfolio asset allocation, monitoring and re-balancing.
- Understand the framework for portfolio management and financial planning for HNWI.

Program Accreditation

This program is recognized by the London Institute of Banking & Finance “LIBF” in UK. For more information, please visit their website: www.libf.ac.uk



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Program Content

➤ **The Investment Management Process and Investment Policy**

- Introduction to Investment Analysis
- Determine investment objectives and constraints;
- Create an investment policy statement;
- Establish a strategic asset allocation;
- Select securities;
- Monitor the market and the client;
- Appraise the portfolio's performance;
- Re-balance the portfolio;
- Investor Behavior: Behavioral Finance and Personality Profiling;
- Craft the Investment policy statement

➤ **Analysis of Investment Products**

- Equity Securities
- Analysis of Equity Securities I : Economic and Industry Analysis
- Analysis of Equity Securities II : Company Analysis and Valuation
- Debt Securities
- Analysis of Debt Securities I : Valuation, Term Structure and Pricing
- Analysis of Debt Securities II : Price Volatility and Investment Strategies

➤ **Advanced Financial Planning**

- Fiduciary duties to the client
- Advanced financial planning concepts
- Asset allocation and portfolio management
 - Determining investors' objectives
 - Asset allocation
 - Portfolio selection techniques
- Different types of funds



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➤ **Advanced Wealth Management Products**

- Mutual funds and unit trusts
- Exchange funds, and others
- Derivatives Investments
- Term life, Takaful, annuity and other life products
- Structured savings plans including: funds, equities and bonds
- Sharia Compliant Financial Products

➤ **Sophisticated Portfolio Management**

- Introduction to capital market structures
- Managing wealth of high net worth clients
- Managing and constructing large-scale portfolios.
- Portfolio Monitoring, Rebalancing and Performance Appraisal
- Managing inherited wealth.





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Eligibility for Admission

Participants should meet the following requirements:

- Be recommended by their banks to attend
- Have successfully passed the Certified Bank Relationship Manager for HNW Customers Program – CBRM (preferable)
- Hold a University qualification
- Pass the English Placement Test at IBS (for Non-CBRM holders)
- This certificate is dedicated to Emerging Leaders (Managers)

Working Experience

- Have worked in banking with minimum 3 years of experience as Relationship Manager, Private Banker, Retail Branch Manager, Personal Banking Officer, or similar jobs.

Language

The program will be presented in English language.

English Placement Test

- The test will be conducted on Tuesday **20 March, 2023**
- English placement test fees: KD 10/- for each nominee

Program Exam

Program success is subject to examination. The exam will be held at IBS. The pass mark is 70%, and there will be no re-sits or makeup exams.

Exam date: Tuesday **11/4/2023**



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Attendance

Attendance at every day is pre-requisite of Certificate issue.

E-Learning

Participants need to complete the required e-learning courses according to IBS schedule.

Reports

Punctuality, participation, quality of input, initiative, teamwork, etc., will - where appropriate- be reported upon.

Timings

The program will be conducted in class at KIBS venue. It will be held from 9:30 am to 1:30 pm (Ramadan timings).

Methods

Lecture-discussion, exercises, and role playing methods will be used in this program.

Duration

8 days (Sundays to Wednesdays) for 30 training hours.

Note:

Overall responsibility and final decisions will be with the Institute of Banking Studies.



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Nominations

Nomination forms need to be sent to IBS by Sunday March 19, 2023.

FOR INQUIRIES & REGISTRATION

For further inquiries, please call:

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