



FINANCE AND TREASURY TRAINING

Private Banking and Wealth Management

5 day course

Classroom, online or in-house

Course overview

Advising private clients is a different discipline from managing institutional money, because the objectives are personal, the constraints are often family rather than financial, and the adviser carries a suitability obligation to somebody who may not understand what they are agreeing to. This course covers the practice. Delegates work through client discovery and risk profiling, goal based planning across accumulation and drawdown, portfolio construction for a private client, and the specific matters of succession, trusts and cross border residence that dominate African and expatriate wealth. Regulatory duties around suitability, disclosure and conflicts are treated as the core of the role rather than an overlay.

What you will learn

- Conduct client discovery and build an accurate risk profile
- Translate personal goals into an investment policy statement
- Construct and review a portfolio against a private client mandate
- Advise on succession, trusts and intergenerational transfer
- Address cross border residence and currency considerations
- Discharge suitability, disclosure and conflict of interest duties
- Handle the conversation when a client wants something unsuitable

Who should attend

- Private bankers and relationship managers
- Wealth managers and financial planners
- Investment advisers
- Trust and fiduciary professionals
- Compliance staff supporting wealth businesses

Course outline

- 01 What private clients want, and how it differs from institutional mandates
- 02 Client discovery and risk profiling
- 03 Goal based planning across accumulation and drawdown
- 04 Portfolio construction for a private client
- 05 Succession, trusts and intergenerational transfer
- 06 Cross border residence, currency and offshore structures
- 07 Suitability, disclosure and conflicts of interest
- 08 Handling an unsuitable request

Upcoming dates

Dates	Venue	Format	Fee per delegate
21 to 25 September 2026	Johannesburg, South Africa	Classroom	R19,950
5 to 9 October 2026	Pretoria, South Africa	Classroom	R19,950
12 to 16 October 2026	Gaborone, Botswana	Classroom	R19,950
11 to 15 January 2027	Cape Town, South Africa	Classroom	R19,950



Fees and how to register

This 5 day course is **R8,500** per delegate online, **R19,950** in the classroom in South Africa, Botswana, Namibia, Lesotho and Eswatini, and **USD 1,325** in the classroom elsewhere in Africa. In-house training is quotation on request. Book 2 or more delegates on this course and save 10%.

To register or request an in-house proposal, visit www.afrisciencegroup.com, email info@afiscience.co.za, or WhatsApp us on **+27 63 479 1136**.

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