Consultative Selling Skills to Investment Clients

Learn how to maintain and grow business in an increasingly sophisticated, competitive and volatile market. Learn to speak confidently and compellingly to clients about investments and their individual portfolios, and to build solid, lasting relationships with investment clients.

Targeted Audience

New Private Bankers, New Wealth Advisors, Brokers who are going to cover broader wealth solutions, Portfolio Managers and other Product Specialists requiring an in-depth overview of wealth management, Individuals working in the finance arena

Special Offer

Clients who register for this course will receive a complimentary 3 month subscription to the Financial Times and FT.com. The Financial Times is the world's most respected financial newspaper, providing a broad assessment on finance, business and the industrial sector. Subscriptions will start within 6-8 weeks of the application process and are limited to one per client. For questions about your subscription, call 800-628-8088 or email uscirculation@ft.com. U.S. enrollees only. (All non-U.S. enrollees will receive a subscription to FT.com only.) Lunch included for all students taking day classes.

Advance Preparation

No advance preparation required.

Prerequisites

Financial calculator required.

Learning Objectives

Students will be able to:

. maintain and grow business in an increasingly sophisticated, competitive and volatile market

. speak confidently and compellingly to clients about investments and their individual portfolios

. build solid, lasting relationships with investment clients

Level: Basic

CPE Credits: 14.0

Instructional Method: Group-Live

Detailed Outline

Part 7 of the Wealth Management Program

For more information regarding administrative policies such as complaints and refunds, please contact our offices at 212-641-6616.