



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 4-month subscription to FT.com. The Financial Times is the world's most respected financial newspaper, providing a broad assessment on finance, business and the industrial sector. The move to the electronic version follows an ongoing review of our environmental responsibilities as a global business and as part of the Pearson group. FT.com also has features that are not available in hard copy, such as: Special Reports, Alphaville, editor blogs, education sections and much more! Subscriptions will start within 6-8 weeks of the start of class and are limited to one subscription per client. (Please note: as of May 1, 2011, the electronic subscription replaces the hard-copy 3-month Financial Times subscription.)

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.