WMAI
WEALTH MANAGEMENT
ACADEMY INDIA

Certified Private Banker

Step into the World of Elite Private Banking. This program sharpens your skills in client discovery, portfolio advisory, investment strategies, and relationship excellence.

Designed for banking professionals seeking to specialize in the affluent segment, this program provides the strategic tools and global perspectives required to lead as a Certified Private Banker.

Program Duration: 3 months

Scan to learn more.

Program Start Date:
15th April 2026

Pre-assessment upon registration

How WMAI Delivers Real-World Advisory Impact

- Proprietary AI-assisted andragogy designed for real client situations.
- Emphasis on job performance success (wide-gate approach).
- Upskill affluent bankers into private bankers with plug-and-play certification pathways.
- Build advisory credibility, increase wallet share, and boost client stickiness
- Tailored learning labs, role-play studios, and branded certifications for your workforce.

Module

1 Global Private Banking & Competitive Landscape (Online)
Stay ahead by understanding the rise of family offices and India's global role. Learn to integrate ESG and digital innovation into advisory models that meet the demands of tomorrow's clients.

2 Investment Products & Portfolio Construction (Online, In-person)
Build sophisticated, resilient portfolios using alternative assets and modern allocation models. Gain the expertise to manage risk through hedging and leverage global wealth solutions to meet complex, high-net-worth client needs.

3 Regulatory Intelligence & Risk Oversight in Wealth Advisory (Online)
Build enduring client trust by mastering ethical frameworks and cross-border risk management. Learn to leverage AI and RegTech to navigate complex compliance landscapes while protecting your firm's reputation and integrity.

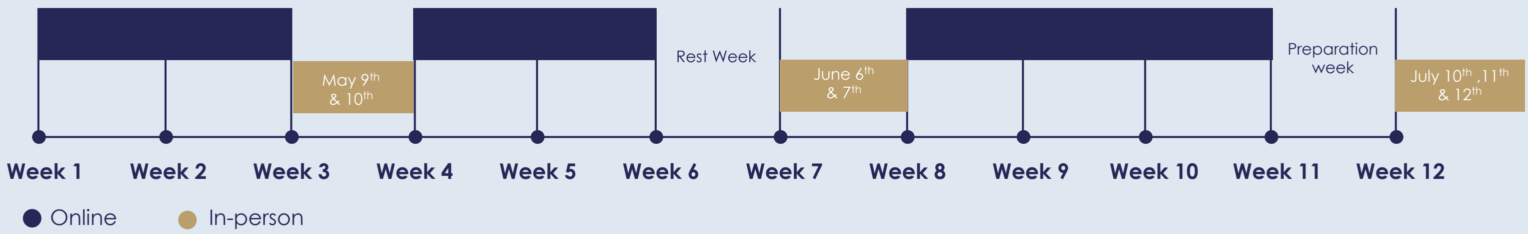
4 HNWI Lifestyle, Client Psychology & Relationship Building (In-person)
Deepen your influence by understanding the psychology behind high-net-worth decisions. Develop the emotional intelligence and executive presence needed to align financial strategies with your clients' personal aspirations and legacy goals.

5 Strategic Investment Advisory, & Client Investment Suitability (In-person)
Bridge the gap between strategy and psychology by understanding behavioral finance. You will learn to structure institutional-grade proposals that ensure regulatory suitability, protecting both your clients and your professional reputation.

6 Wealth Planning, Legacy Structuring & Intergenerational Advisory (Online)
Become a multi-generational partner by mastering succession planning and cross-border wealth transfer. Learn to guide families through legacy visioning and philanthropic goals while effectively engaging and preparing the next generation.

7 Consultative Selling & Strategic Client Acquisition (In-person)
Transition from product-pushing to advisory-led success. Use wealth storytelling and financial coaching to deepen trust, while leveraging niche networks and centers of influence to build a high-quality, referral-based client pipeline.

8 Executive Presence, Digital Fluency & Strategic Influence (In-person)
Amplify your professional impact by mastering executive presence and digital thought leadership. Learn to build trust on LinkedIn and navigate bank ecosystems with the strategic influence needed to lead high-level conversations.



This Program Includes:

- 38 hours – Asynchronous learning (self-paced modules)
- 8 hours – Online
- 56 hours – In-person
- Final written exam
- Role-play assessment
- 2 Capstone project/presentation (for existing and new client)

Accelerate Your Ascent, Step into Strategic Private Banking. Register Today.

Email: **contact@wmai.biz** Contact: **+91 88262 10222 (Chandan)**

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