

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

Pre-assessment upon registration



Scan to learn more.

Program Start Date:

15th June 2026

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.

Program (The 12 Readiness Pillars)

Foundation

- 1 Think Like a Private Banker**
India's Wealth Opportunity & Why Now, What Wealthy Clients Really Evaluate, The Private Banker Mindset & Competency Wheel.
- 2 Inside the Ultra-Wealthy Mind**
How India's Wealthy Live, Think & Decide, The Psychology Behind Every Client Decision, Family Dynamics & Who Really Decides.
- 3 Global & Local Private Bank Landscape**
Global Private Banking: Key Players & Trends, India's Position on the World Wealth Map, Opportunities Most Bankers Haven't Spotted Yet.

Engagement

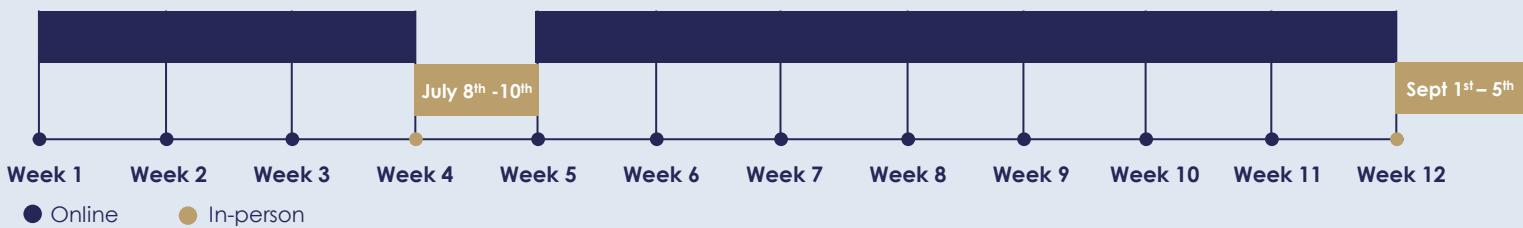
- 4 Client Discovery Conversations**
Executive Presence, Personal Brand & First Impressions, Discovery Questioning & The Iceberg Principle, Client Mindset, Biases & Objection Handling.
- 5 Prospecting Pipeline Discipline**
What a Healthy Pipeline Actually Looks Like, The 5 Sources of Prospect Flow in India, Building a System That Replaces Luck.
- 6 Winning New Clients-Best Practices**
Real Stories: What Wins Clients & What Loses Them, The Art of the First Conversation, Referrals, Trust & Conversion Tactics.

Strategy

- 7 Products, Strategies & Portfolio Logic**
The Full Product Shelf: Investment, Lending, Insurance, NRI & Structuring, Risk-Return in Language Clients Actually Understand, Portfolio Logic: Matching Products to Goals, Not Pushing a Menu.
- 8 Products in Practice & Market Resilience**
Live Expert Q&A: Your Real Product Questions Answered, Guiding Clients Through Market Panic, The Acknowledge-Anchor-Advise Framework.
- 9 Navigating Family, Legacy & Wealth Priorities**
Opening the Conversations Most Bankers Avoid, Succession Structures: Trusts, Wills & Family Governance in India, Ethics, Confidentiality & the Banker's Boundaries.

Mastery

- 10 Tax, Trusts & the Traps That Destroy Wealth**
Regulatory Guardrails Every Private Banker Must Know, Tax Awareness at Banker Level - Not Advice, But Advantage, Wealth-Destruction Traps Hiding in Your Client Book.
- 11 Strategic Client Conversations & Relationship Deepening**
Segmenting Your Book Beyond AUM, Turning Everyday Touchpoints Into a Referral Engine, Capstone Coaching: Polish Your Transformation Story.
- 12 Ready to Win**
Portfolio Construction Lab: Build, Defend, Present, Pitch & Objection Handling Under Real Pressure, Capstone Presentation & Certification Exam.



This Program Includes:

- 30 hours – Self-paced online learning
- 12 hours – Virtual workshop (Zoom)
- 58 hours – In-person workshop
- Final written exam
- Role-play assessment
- Capstone presentation

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

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Scan to Contact

