

Certified Private Banker

Step into the world of elite private banking.

Develop the advisory, investment, and relationship capabilities required to acquire, advise, and serve high-net-worth clients with confidence.

PROGRAM
DURATION

12 weeks

PROGRAM
START DATE

Next Cohort to be
Announced



Scan to
learn more.

THIS PROGRAM INCLUDES

30 HOURS

Self-Paced
Online Learning

12 HOURS

Virtual Workshop
(Zoom)

58 HOURS

In-Person
Workshop

Role-Play
Assessment

Capstone
Presentation

PROGRAM (THE 12 READINESS PILLARS)

FOUNDATION	Think Like a Private Banker	Inside the Ultra-Wealthy Mind	Global & Local Private Bank Landscape
Session 1-3	Build the private banker mindset by understanding India's wealth opportunity, how affluent families think and make decisions, and the global and local private banking landscape.		
ENGAGEMENT	Client Discovery Conversations	Prospecting Pipeline Discipline	Winning New Clients-Best Practices
Session 4-6	Develop the skills to build trust, uncover client needs, manage objections, and create a disciplined prospecting approach that turns meaningful conversations into lasting client relationships.		
STRATEGY	Products, Strategies & Portfolio Logic	Products in Practice & Market Resilience	Navigating Family, Legacy & Wealth Priorities
Session 7-9	Learn to deliver holistic wealth advice through portfolio logic, product expertise, market resilience frameworks, and family wealth planning that align solutions with client goals and legacy priorities.		
MASTERY	Tax, Trusts & the Traps That Destroy Wealth	Strategic Client Conversations & Relationship Deepening	Ready to Win
Session 10-12	Advance your advisory capability through tax and trust awareness, relationship deepening, portfolio construction, and real-world client presentations that prepare you for long-term certification.		

● Online ● In-person



HOW WMAI DELIVERS REAL-WORLD ADVISORY IMPACT

Proprietary AI-assisted
andragogy designed for
real client situations.

Emphasis on job
performance
success.

Build advisory
credibility, increase
wallet share, and boost
client stickiness.

Tailored learning labs,
role-play studios, and
branded certifications
for your workforce.

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

Strategic Partners

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ISOFP
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Financial Planners

EAGLE
VENTURE STUDIO ASIA



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