Mastering Wealth Management: Your Path to Elite Expertise

Cultivating Top-Tier Wealth Management Professionals Through Advanced Training In Financial Planning, Market Analytics, And Client Relationship Mastery

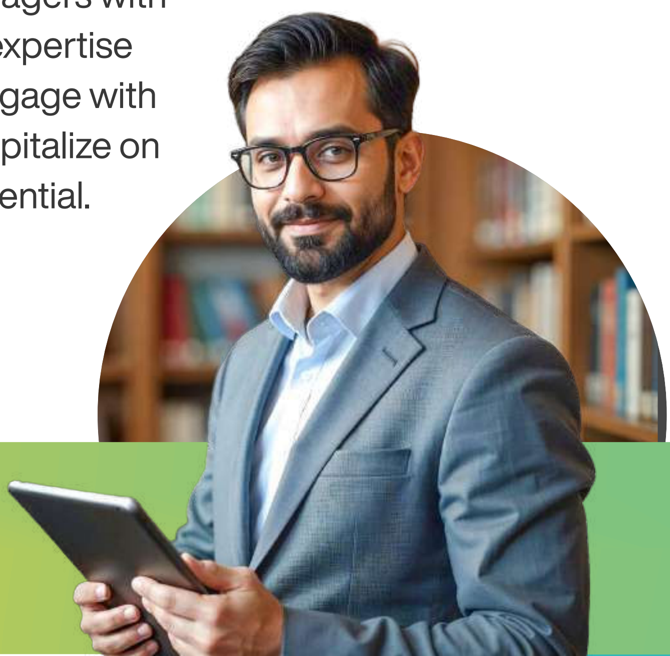
Seizing the Opportunity:
India's Booming Wealth Management Landscape

India's wealth management industry is experiencing unprecedented growth, with Assets Under Management (AUM) expanding at an impressive 15-20% annually. Projections indicate a rise to $1.8 trillion within the next 4-5 years, reflecting a robust 13-14% Compound Annual Growth Rate (CAGR). Reports from Hurun India and Knight Frank's Wealth Report 2025 highlight a significant surge in HNI and UHNI populations, with estimates showing a 9.4% and 50% growth, respectively, over the next 4-5 years.

This exponential growth is driven by a fundamental shift in investor behaviour, moving away from traditional assets like fixed deposits, gold, and real estate towards more dynamic options. Investors are increasingly exploring Alternative Investment Funds (AIFs), REITs, InvITs, Venture Capital, early-stage investment funds, and private equity, alongside traditional choices such as mutual funds, equities, and money markets.

To meet this escalating demand, the number of Relationship Managers (RMs) in India's wealth management sector surpassed 10,000 by the end of FY'24. Financial institutions are actively deepening their presence in crucial segments like HNIs and UHNIs, while also significantly boosting penetration in Tier II and Tier III cities.

This dynamic environment necessitates a highly skilled workforce. Our customized Wealth Management program is specifically designed to equip Wealth Relationship Managers with the advanced skills and expertise required to effectively engage with discerning clients and capitalize on this immense market potential.



Experiential Curriculum for Elite Professionals

Our program delivers a comprehensive and experiential curriculum, meticulously designed to equip wealth management professionals with the advanced knowledge and skills necessary to excel in this complex and rapidly evolving landscape.

- Financial Planning & Goal Setting
- Digital Tools & Technology in Wealth Management
- Advanced Wealth Management Strategies
- Investment Opportunities for NRIs in India
- Macroeconomics for Wealth Management
- Alternative Investment Funds (AIFs): Concepts & Opportunities
- Quantitative Techniques for Wealth Management
- Market Analysis: Trends, Ratios, Returns & Indicators
- Client Relationship Management & Advanced Sales Skills
- Portfolio Management: Theories & Application
- Risk Management & Asset Protection
- Tax Planning & Tax-Efficient Investments
- Estate Planning & Retirement Planning

Who Is This Program For:

Early-career wealth managers and relationship managers aiming to establish a strong foundation

Mid-career professionals looking to transition into specialized wealth management roles

Customizing Our Program to Your Specific Needs

We understand that every financial institution has unique requirements. Our wealth management training program is designed with flexibility and customization at its core, ensuring it aligns perfectly with your specific objectives and operational framework

1

Curriculum adjustment based on required coverage

2

Depth to which each subject to be covered – basis the job role, cohorts and management expectations

3

Each of the subjects and topics covered under the subjects would be customized to the bank's products, services, processes and internal policies

4

Program duration is flexible and can be customized based on the bank's requirements

The entire process of detailed curriculum development will be co-created with the business and SME SPOC from the bank and Manipal.

Program Pedagogy:
Learning By Doing

We employ experiential learning methodologies to give students a real-world sales experience.

Case Studies-based Learning

Deep dives into real-life problem-solving, end-to-end financial planning execution, and scenario data analysis through compelling case studies

Client Segmental Approach

Focused learning on managing diverse client segments, including HNI and UHNI specific strategies

Investment & Client Portfolio Deep Learning

Intensive study based on actual investment and client portfolios for enhanced understanding

Macroeconomics & Market Data Analysis

An approach grounded in analyzing macroeconomic trends and market data to inform strategic decisions

Behavioral & Soft Skill Enhancement

Sharpening critical behavioral and soft skills, including group dynamics, presentation prowess, and collaborative learning for superior client engagement

What You Will Achieve

Upon program completion, participants will be equipped with skills in:

- **Wealth Management:** A deep understanding of wealth management principles and their strategic application
- **Advanced Financial Planning:** Proficiency in developing comprehensive financial plans, including tax, estate, and retirement planning
- **Expert Investment Analysis:** In-depth knowledge of investment products (MF, Equities, AIFs, etc.) and effective portfolio management
- **Enhanced Client Relationship Management:** Superior skills in client engagement, profiling, and delivering personalized financial strategies
- **Market Acumen:** The ability to analyse market trends, interpret indicators, and apply quantitative techniques for informed decision-making
- **Digital Proficiency:** Competence in utilizing digital tools and emerging technologies for efficient wealth management
- **Strategic Advisory:** Capability to advise NRI clients on investment opportunities and navigate complex regulatory frameworks
- **Increased Business Outcomes:** Direct impact on top-line growth, active portfolio management, improved client retention, and identifying cross-sell/upsell opportunities

Who We Are

Established in 2008, Manipal Academy of BFSI, a UNext Learning entity and part of the Manipal Education and Medical Group (MEMG), is a premier institution that provides industry-relevant education and training for both freshers and experienced professionals in traditional operations, sales, and new-generation roles within the banking, financial services, and insurance sectors.

With a focus on innovation and learner-centricity, Manipal Academy of BFSI offers a wide range of programs designed to equip individuals with the skills and knowledge to thrive in the BFSI industry. Today, the academy of BFSI annually trains over 15,000 BFSI industry professionals for its industry partners.

With our expertise and deep understanding of market needs, our goal is to create the leaders of tomorrow and build a top-notch workforce for the BFSI industry.

Our Impact Over The Years

17+ years
Of Legacy

1 in 5
Bankers In India Is Our Alum

2,00,000+
Professionals Trained

1,00,000+
First-Time Professionals Trained

50+
Client Partnerships

4,000+
Case Studies

220+
Experienced Faculty

To nurture next-gen BFSI professionals,
drop us an email today at:

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