



Accelerating Wealth Management Expertise

A Customized Program Encompassing
Knowledge, Customer Relationship
Management Skills, Market Analytics And
Financial Planning For Wealth Managers



The Growing Imperative for Specialized Wealth Management

Wealth management is a critical and expanding function within the banking sector, encompassing investment advisory, tax services, estate planning, and retirement planning for both individuals and institutions. While traditionally focused on High-Net-Worth Individuals (HNIs), its scope is broadening to serve a wider demographic through tiered offerings. The core objective remains to efficiently grow, protect, and transfer wealth through personalized financial strategies across diverse instruments such as Mutual Funds, Equities, AIFs, Insurance, and tax-efficient investments.

India's wealth management sector is experiencing significant growth. Current Assets Under Management (AUM) exceed ₹33+ Lakh Crore (~\$400 billion), projected to grow at a 12-15% CAGR over the next five years. The HNI population in India, currently over 3,00,000, is estimated to surpass 5,00,000 by 2027. This rapid expansion is fueled by the rise of an affluent middle class, a thriving startup ecosystem, robust family businesses, and the proliferation of digital platforms.



Addressing The Skill Gap Through UNext Manipal Academy Of BFSI's Tailored Solution

Traditional banking education often falls short in providing the practical, industry-specific expertise essential for effective wealth and portfolio management. Recognizing this, Manipal Academy of BFSI (MABFSI) developed a role-specific training program meticulously tailored to the bank's requirements. This program aims to transform new recruits and existing wealth managers into expert professionals, significantly reducing client onboarding time and enhancing their knowledge and service skills.

Manipal Academy of BFSI: Our Approach

Manipal Academy of BFSI (MABFSI) delivers comprehensive, tailored training programs for banking professionals, distinguished by:

-  **Expert Curriculum Design**
Developing highly relevant and up-to-date content
-  **Practical Exposure**
Integrating real-world scenarios and hands-on learning
-  **Expert Faculty**
Leveraging experienced industry professionals
-  **Customized Programs**
Tailoring solutions to specific client needs



Program Customization & Design

Through extensive discussions with the bank, MABFSI identified the need for a highly customized program to address the unique and dynamic skill sets required by wealth managers. MABFSI assisted the bank in profiling ideal participants and based on their specific needs and recommended a condensed 6-day program. This duration was significantly shorter than typical flagship programs, optimizing time-to-competency.

Given the evolving market trends, both the bank and MABFSI mutually agreed that wealth managers must be equipped to:



- Provide comprehensive financial planning, including tax and retirement planning
- Advise NRI clients on diverse investment opportunities
- Conduct robust investment planning and analysis
- Clearly explain market trends
- Effectively manage investment portfolios
- Guide clients through the "Save, Borrow, Invest, Protect, and Spend" framework
- Navigate complex regulatory frameworks and compliance requirements in investments
- Utilize digital tools and technologies relevant to wealth management
- Apply quantitative techniques and economic principles in wealth management

Training Methodology

MABFSI's training methodology is rooted in the Knowledge, Skill, and Attitude (KSA) framework. It focuses on building robust banking fundamentals and cultivating a relationship management mindset driven by deep domain expertise. The curriculum underwent rigorous development, involving multiple rounds of discussions and reviews between MABFSI's content team and the bank's product and process teams.

Program Coverage

- Financial Planning And Goal Setting
- Wealth Management Strategies
- Macroeconomics For Wealth Management
- Quantitative Techniques For Wealth Management
- Client Relationship Management And Sales Skills
- Risk Management And Asset Protection
- Digital Tools And Technology In Wealth Management
- Investment Opportunities For NRIs In India
- Alternate Investment Funds Concepts And Opportunities
- Market Trend Analysis, Ratios ,Returns And Indicators
- Portfolio Management Theories And Application
- Tax Planning And Tax Efficient Investment
- Estate And Retirement Planning

Demonstrable Outcomes and Impact

The initial pilot batch of 45 learners successfully completed the 6-day certification program, demonstrating proficiency in post-training assessments. Their subsequent on-the-job progress and performance were diligently monitored, confirming the program's high effectiveness. The newly trained wealth managers consistently met and exceeded departmental requirements, validating the program's practical impact.

Building on this success, the client bank collaborated with MABFSI to train four additional cohorts, comprising 60-70 learners each. This partnership has now resulted in approximately 250 highly skilled wealth management employees performing at optimal levels, significantly enhancing the bank's productivity and expertise in this critical function. The success has also attracted interest from other financial institutions, with two major banks and one Small Finance Bank (SFB), subsequently nominating their employees for similar training.

This case exemplifies MABFSI's capability to deliver high-quality, high-impact, outcome-oriented training programs that are meticulously customized to address specific organizational needs and align with broader business goals.



About Manipal Academy of BFSI

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+

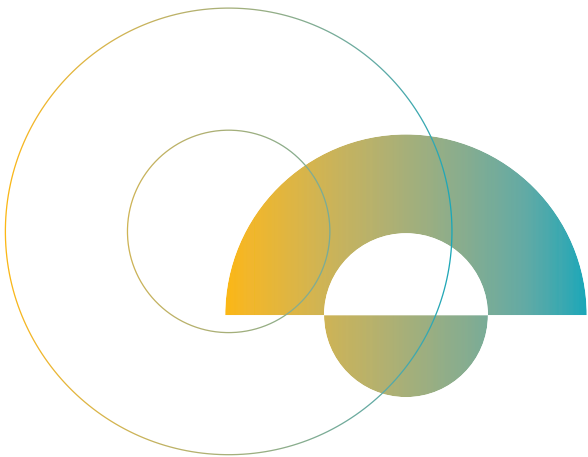
Client Partnerships

4,000+

Case Studies

220+

Experienced Faculty



To nurture next-gen professionals
in your enterprise, drop us an
email today:

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