FTS

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IN-PERSON WORKSHOP

Future-Ready Private Banking: AI-Enhanced Client Discovery & Portfolio Growth

Target Audience
Private Banking Relationship Managers, Private Bankers, Wealth Advisors, and Family Office Professionals

Duration: 7 CPD Hours
Fee: SGD 1,200 per participant

EARLY BIRD DISCOUNT

Enjoy **10% discount** when you register **one (1) month before** the course commencement date.

Learning Objectives

- Apply AI-augmented client discovery and personalisation techniques to strengthen UHNW client engagement
- Improve advisory efficiency and drive measurable portfolio and revenue growth using AI-powered insights

Equip private banking professionals with AI-enhanced capabilities to uncover deeper client insights, accelerate portfolio growth, and deliver differentiated advisory experiences.

WHAT YOU'LL LEARN

1. AI Foundations for Private Banking
- Role of AI in modern wealth management
- AI tools for client discovery and relationship enhancement
- Balancing AI efficiency with human-centred advisory

2. AI-Augmented Client Discovery
- Uncovering sophisticated client needs using AI-driven research
- Advanced questioning for complex family wealth dynamics
- Preparing for multi-generational wealth scenarios

3. Prompt Engineering for Advisory Excellence
- Apply generative AI to support client discovery and advisory preparation
- Design prompts to personalise engagement for UHNW and family office clients

4. Hyper-Personalised UHNW Advisory
- Understanding UHNW decision-making patterns with AI insights
- Personalising advisory conversations across portfolio and wealth planning
- Building trust while addressing complex structuring needs

5. Live Client Simulation & Integration
- Hands-on practice with AI-powered client scenarios
- Real-time coaching and peer feedback
- Immediate application planning for private banking practice

PRACTICE & APPLICATION

- UHNW client role-plays using AI-enhanced discovery techniques
- Guided feedback to reinforce applied learning

KEY VALUE PROPOSITION

- Combines AI tools with proven private banking frameworks
- Practical, role-play-driven learning with immediate application
- Delivers data-driven advisory capabilities that accelerate AUM growth
- Actionable AI techniques for differentiated, data-driven advisory

Completion of this course can be counted towards the fulfillment of the non-STS portion for CACS CPD.
This course is recognized under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met. Please note that **in no way** does this represent an endorsement of the quality of the training provider and course. Participants are advised to assess the suitability of the course and its relevance to his/her business activities or job roles.
The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS provides up to 70% course fee subsidy support for direct training costs subject to a cap of S$500 per candidate per course subject to all eligibility criteria being met.
Find out more on www.ibf.org.sg

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Financial Training Scheme (FTS)

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