WEALTH MANAGER DEVELOPMENT

FULL DAY PROGRAMS

Winning & Developing New Client Relationships

Build a pipeline of affluent prospects, secure introductions and convert opportunities into long-term client relationships.

Conducting Effective Discovery Conversations

Ask insightful questions, uncover client priorities and identify opportunities to provide greater value.

Presenting Recommendations & Gaining Commitment

Present ideas with confidence, address concerns effectively and gain commitment to clear next steps.

Deepening Client Relationships & Growing Wallet Share

Strengthen existing relationships, uncover additional opportunities and increase the proportion of assets entrusted to you.

Building Multi Generational Client Relationships

Develop relationships across the family, engage the next generation and support long-term continuity of client relationships.

BRIEFINGS (45 - 90 MINUTES)

- Generating Referrals & Introductions
- Becoming A Trusted Adviser
- Asking Better Questions
- Handling Challenging Client Conversations
- Re-engaging Dormant Clients

WEALTH MANAGER PERFORMANCE COACHING

Individual coaching can be provided to support Wealth Managers in applying new skills, overcoming challenges and improving results.

Sessions focus on the Wealth Manager’s specific goals, opportunities and development areas.

Typically delivered over a series of sessions, personal coaching provides the opportunity to discuss real situations and challenges, explore options and receive practical guidance and support.

TRANSFORM's Wealth Manager Development programs are designed to help Wealth Managers strengthen client relationships and increase wallet share.

From securing introductions and building trust and relationships to uncovering opportunities, gaining commitment and developing multi generational client relationships.

Our programs focus on the practical skills required to succeed in today's highly competitive wealth management environment.

Addressing real-world situations Wealth Managers face, they learn practical strategies and techniques they can apply immediately.

Programs can be delivered as standalone workshops or incorporated into wider Wealth Manager development journeys.

Pre-program selling style assessments and post-program reinforcement can be provided where required.

Singapore based since 2008, TRANSFORM specialises in the Banking sector and works internationally.

CONTACT

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