



FINANCE AND TREASURY TRAINING

Private Banking and Wealth Management

5 day course

Classroom, online or in-house

Course overview

Advising private clients is a different discipline from managing institutional money, because the objectives are personal, the constraints are often family rather than financial, and the adviser carries a suitability obligation to somebody who may not understand what they are agreeing to. This course covers the practice. Delegates work through client discovery and risk profiling, goal based planning across accumulation and drawdown, portfolio construction for a private client, and the specific matters of succession, trusts and cross border residence that dominate African and expatriate wealth. Regulatory duties around suitability, disclosure and conflicts are treated as the core of the role rather than an overlay.

What you will learn

- Conduct client discovery and build an accurate risk profile
- Translate personal goals into an investment policy statement
- Construct and review a portfolio against a private client mandate
- Advise on succession, trusts and intergenerational transfer
- Address cross border residence and currency considerations
- Discharge suitability, disclosure and conflict of interest duties
- Handle the conversation when a client wants something unsuitable

Who should attend

- Private bankers and relationship managers
- Wealth managers and financial planners
- Investment advisers
- Trust and fiduciary professionals
- Compliance staff supporting wealth businesses

Course outline

- 01 What private clients want, and how it differs from institutional mandates
- 02 Client discovery and risk profiling
- 03 Goal based planning across accumulation and drawdown
- 04 Portfolio construction for a private client
- 05 Succession, trusts and intergenerational transfer
- 06 Cross border residence, currency and offshore structures
- 07 Suitability, disclosure and conflicts of interest
- 08 Handling an unsuitable request

Upcoming dates

Dates	Venue	Format	Fee per delegate
2 to 6 September 2026	Kigali, Rwanda	Classroom	R11,995
6 to 10 September 2026	Kigali, Rwanda	Classroom	R11,995
12 to 16 September 2026	Accra, Ghana	Classroom	R11,995
14 to 18 September 2026	Victoria Falls, Zimbabwe	Classroom	R11,995



Fees and how to register

Online **from R6,500** per delegate, classroom **from R11,995** per delegate, in-house training is quotation on request. Book 2 or more delegates on this course and save 10%.

To register or request an in-house proposal, visit www.afrisciencegroup.com, email info@afriScience.co.za, or WhatsApp us on **+27 63 479 1136**.

AfriScience Group | +27 61 536 6531 | info@afriScience.co.za | Pretoria, Gauteng, South Africa