



PROFESSIONAL DEVELOPMENT FOR WOMEN

Women in Banking and Investment: Client Facing and Revenue Roles

3 day course

Classroom, online or in-house

Course overview

In banking and investment management the pay and progression gap concentrates in revenue generating roles rather than in support functions, because origination, coverage and portfolio ownership depend on client relationships and on being credited for a deal. This course addresses both. Delegates work through building a client base including the network access and introduction routes that are unevenly distributed, credibility with clients who expected somebody else, and entertainment, travel and relationship building on terms you set. Deal and mandate attribution is covered directly, since revenue credit determines compensation. Portfolio and mandate ownership follow. The course closes on moving between institutions, on carrying clients, and on negotiating compensation where the number is discretionary.

What you will learn

- Build a client base and secure network access and introductions
- Establish credibility with a client who expected somebody else
- Handle entertainment, travel and relationship building on your terms
- Secure attribution and revenue credit for deals and mandates
- Take and hold ownership of a portfolio or mandate
- Move between institutions and carry client relationships
- Negotiate a discretionary compensation number with evidence

Who should attend

- Women in corporate and investment banking
- Relationship and coverage managers
- Investment and portfolio managers
- Wealth and private client advisers
- Managers responsible for revenue team development

Course outline

- 01 Where the gap concentrates
- 02 Building a client base
- 03 Network access and introductions
- 04 Credibility with a client who expected somebody else
- 05 Entertainment, travel and relationship building
- 06 Deal and mandate attribution
- 07 Portfolio and mandate ownership
- 08 Moving institutions and discretionary compensation

Upcoming dates



Dates	Venue	Format	Fee per delegate
7 to 9 October 2026	Cape Town, South Africa	Classroom	R14,950
19 to 21 October 2026	Dar es Salaam, Tanzania	Classroom	USD 995
9 to 11 November 2026	Kampala, Uganda	Classroom	USD 995
25 to 27 November 2026	Lagos, Nigeria	Classroom	USD 995

Fees and how to register

This 3 day course is **R6,500** per delegate online, **R14,950** in the classroom in South Africa, Botswana, Namibia, Lesotho and Eswatini, and **USD 995** in the classroom elsewhere in Africa. 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**.

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