Dimensions humaines

ECTS : 3

Enseignant responsable : Vincent JOULIA

Langue du cours : Français

Volume horaire : 9

Description du contenu de l'enseignement :

The course aims at helping students identify human issues they are likely to face when working in private banking and wealth management industries, identify skills required as well as finalize their personal project 1. Customer Relationship Management in private banking and wealth management (KYC, client interview, data gathering…) 2. Excellence in private banking and wealth management (trustfulness, client experience, attention to details…) 3. Challenges associated with private banking and wealth management (administrative workload, training requirements, sales objectives, client negociation, credit risk assessment…) 4. Professional risks associated with private banking and wealth management (misadvice, bad execution, criminal penalties, obsolescence…) 5. Growth of client portfolio (cost of relation, segmentation, revenues…) 6. Career diversity and progress in private banking and wealth management

Compétences à acquérir :

Increased awareness of how human aspects shall be managed in the private banking and wealth management industry in order to succeed

Coefficient : 1.00

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