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NEW

CERTIFIED INTERNATIONAL PORTFOLIO AND RELATIONSHIP MANAGER

Private banking is one of the fastest growing sectors within the financial services industry. Global wealth has been rapidly increasing and is expected to grow at a steady pace in the years to come.

The business environment of private banking has however deeply changed over the last years, and has become far more challenging: the regulatory pressure has grown heavier, domestic and cross-border competition has increased, customers have changed, products and services have become more sophisticated.

To overcome those post-crisis challenges the industry now needs a new breed of private banking professionals, who are able to understand the individual needs of their clients and the complex financial products.



In this respect, the House of Training (www.houseoftraining.lu) has developed a new certification programme which allows professionals involved in any aspect of private banking to remain on top of the most current changes taking place within the industry.

This course, divided into two parts, has been specifically designed by experts from the private banking Luxembourg market, one of the most active in Europe, and is financially supported by the Luxembourg Government.

When and where?

The first part of the "Certified International Portfolio and Relationship Manager" programme will be organized **in Luxembourg from 18 to 22 September 2017** (arrival on 16 Sept, departure on 23 Sept). The courses will focus on Portfolio and Relationship Management.



The second part of the programme, which will evolve around Alternative Investments and Wealth Planning will be organized **from 16 to 20 April 2018**.

Professionals who will successfully pass the assessment will become "**Certified International Portfolio and Relationship Managers**".

Who should attend?

The House of Training will be able to host **15 participants** selected by its Quality Circle in Private Banking. The selection will be based on objective criteria such as the applicants' present function as well as their professional and educational background. The geographical location will not be a selection factor. A **very good knowledge of English** is required.

If you have at least 3 years of experience in the field of portfolio management and wish to arm yourself with a deeper knowledge in financial instruments, investment vehicles and wealth management, then this programme is for you!

Holders of the House of Training/IFBL "Certified Private Banker" (CPB) Certificate (exam passed at the end of our courses held in Luxembourg in 2014, 2015, 2016 or 2017) are



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directly eligible (no selection). However, should the demand exceeds the number of available seats, a selection will be made.

Other candidates shall have fundamental knowledge of financial products, derivatives and portfolio management and will be subject to validation.

We invite you to have a look at the attached documents to get more details on the topics that will be covered in the programme, the assessment and the participation financial conditions.



If you are interested in this fully fledged programme and ready to attend the first part in September 2017 and the second part in April 2018, then please fill in the attached application form and send it back **by 26 May 2017** to House of Training **official Partner in your country**. Please note that only fully completed forms will be considered.

The programme will be a unique opportunity for the participants to meet, exchange views and experience with peers from the House of Training partner countries.

Should you need any further information, do not hesitate to get in touch with us.

We look forward to welcoming you to Luxembourg for this exciting new programme.
Yours sincerely,


Hilda LUTGEN
Project Manager


Josée THYES
Senior Programme Manager

Appendices:

- Programme description
- Financial conditions
- Application form