MERCURY

Premier Banker Training Course

22 – 26 March 2027
Vienna (Austria)



Dubai - UAE: +971 4 450 5697
Istanbul - Türkiye: +90 539 599 1206
Amman - Jordan: +962 79 712 3347

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Ref: 15372_1078455 **Date:** 22 – 26 March 2027 **Location:** Vienna (Austria) **Fees:** 5900 Euro

Introduction:

Premier bankers cater to customers often referred to as preferred or high-wealth. They offer various specialized banking support services and provide personalized attention to promptly resolve any complaints or issues these clients might face.

They proactively contact clients to promote various bank products and services, creating tailored sales pitches and presentations. Their main objective is fostering and nurturing long-term relationships with these clients, which is the essence of premier banking.

Typically holding a bachelor's degree or equivalent professional experience, premier bankers possess experience in banking or wealth advisory sectors, often from financial services or customer service backgrounds.

Premier banking benefits include personalized service and tailored financial solutions, highlighting the importance of understanding premier banking's meaning in the industry context.

Targeted Groups:

- Students are eager to pursue a career in the banking industry.
- BFSI executives aim to enhance their skills and advance their career opportunities.
- Senior Banking Executives.
- High-Net-Worth Individuals.
- Wealth Management Advisors.
- Financial Planners.
- Investment Bankers.
- Private Banking Specialists.
- Corporate Banking Managers.
- Financial Analysts.
- Risk Management Professionals.
- Banking Sector Leaders.

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Course Objectives:

At the end of this premier banker course, participants will be able to:

- Become proficient in banking and finance, digital banking, and mutual funds.
- Acquire a set of banking and financial tools for informed management decisions in a contemporary business setting.
- Gain the ability to interpret financial and banking documents, assess the economic health of organizations, and forecast outcomes effectively.
- Build confidence in contributing to financial decision-making within the banking realm.
- Attain in-depth knowledge of the banking and financial sectors.
- Apply insights to operational processes and the modern banking environment, enhancing the efficiency of banking and finance-related operations.
- Enhance prospects for a successful career in the rapidly growing banking sector.

Targeted Competencies:

Participants competencies in this premier banker training will be able to improve:

- Advanced Financial Analysis and Planning.
- High-Level Client Relationship Management.
- Expertise in Wealth Management Strategies.
- Strategic Risk Assessment and Mitigation.
- Proficiency in Regulatory Compliance and Governance.
- Advanced Portfolio Management Techniques.
- High-Level Negotiation and Persuasion Skills.
- In-depth knowledge of Market Trends and Economic Indicators.
- Excellence in Cross-Selling Financial Products.
- Leadership and Team Management in Banking Operations.

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The Role of a Senior Premier Banker:

Senior Premier Bankers manage key client relationships with high-wealth individuals in the banking sector, offering specialized services that echo the premier banking meaning. They handle complex financial portfolios and devise strategic recommendations to fulfill their client's unique investment and banking needs.

The extensive knowledge and experience required for a Senior Premier Banker include an in-depth understanding of the financial markets, investment advisory, and risk management strategies. This premier banker course equips participants with the acumen to elevate their banking career to a premier level. It delivers a comprehensive skill set essential for excelling in premier banking.

Course Content

Unit 1: Banking And Finance:

- Overview of the BFSI industry.
- Evolution of money and banking.
- Role of banks with an emphasis on banking products and services.
- Banking technology and trends.
- Classification of financial customers.
- Wealth management fundamentals.
- Insight into other financial products and services.

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Unit 2: Digital Banking:

- Exploration of digital banking products.
- Understanding of Debit/Credit/ATM cards.
- ATMs and innovative cash deposit machines.
- Cash recyclers.
- Mobile banking platforms.
- Immediate Payment Service IMPS.
- An in-depth look at Internet banking.
- Point of Sale POS systems.
- Branchless banking solutions.
- Digital banking product marketing.
- Overview of payment systems.

Unit 3: Mutual Funds:

- Introduction to the mutual fund industry.
- Structural details of mutual funds.
- A broad look at mutual fund products and features.
- Regulations governing mutual funds.
- Documentation and investor services associated with mutual funds.
- Analysis of debt and liquid funds.
- Examination of exchange-traded and equity funds.
- Understanding mutual fund taxation.
- Methods for assessing mutual fund performance.
- Concepts in financial planning related to mutual funds.
- Mutual fund products and investment and risk management - advanced topics.
- Valuation, accounting, fund distribution, and sales practices.
- Investor services and scheme evaluation.
- Legal and regulatory requirements and investor protection.

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Unit 4: Financial Market:

- Fundamentals of investment.
- Insights into securities and their markets.
- The role of primary and secondary markets.
- Derivatives and depository systems.
- Mutual funds are critical products in the secondary markets.
- Analytical concepts and modes, including ratio analysis.

Unit 5: Investment Advisory:

- Components of financial planning.
- Risk analysis combined with insurance and retirement planning.
- Formation of investment plans, along with tax and estate planning.

Unit 6: Securities Operations And Risk Management

- Introduction to the securities market ecosystem.
- Detailing the spectrum of market participants.
- Introduction to securities broking operations covering the entire trade life cycle.
- Overview of risk management and regulatory compliances.
- Highlighting clearing processes and the roles of clearing agencies and banks.
- Settlement processes, including equity segment obligations.
- Understand corporate actions, auctions of securities, and the mechanisms for investor grievances and arbitration.
- Additional services are provided by brokers, including IPO applications and trading of mutual fund units.

Unit 7: Equity Derivatives:

- Derivatives basics and index understanding.
- Introduction to forwards and futures in commodities, equity, and indexes.
- Examination of options and option trading strategies.
- Overview of trading, clearing, and settlement systems.
- Legal and regulatory frameworks about equity derivatives.
- Accounting, taxation, sales practices, and investor protection services.