

English for Private Banking Workshop

Objectives

After attending this workshop you will be able to:

- Deal with English-speaking clients and colleagues with confidence
- Build better client relationships
- Explain Private Banking products and services clearly and effectively
- Handle fragile situations with tact and diplomacy

Contents

- Presenting the Private Banking division and structure
- Detailing products and services
- Building the client profile, data gathering
- Developing effective questioning techniques
- Discussing market movements and trends
- Explaining the use and structure of financial instruments and portfolio structure
- Liaising with colleagues and counterparts
- Increasing sensitivity to the language of tact and diplomacy

Methodology

- Direct method – Only English will be spoken
- Short input sessions
- Variety of interactive exercises
- Role plays and simulations

Target Group

Relationship managers, specialists or support staff in the Private banking field who have to deal directly with English-speaking clients. Specialist or support staff who have to deal with English-speaking clients on an occasional basis, or wish to get a clearer view of the banker - client relationship

Prerequisite

Intermediate level of English (B1 on the CEF*)

Duration

3 days

Number of Participants

8

Comments

The workshop will focus principally on building confidence in the spoken language. Participants should be prepared to speak English throughout the seminar.

** CEF = Common European Framework of Reference for Language Learning and Teaching.
Check your level of English with IBC's English Fitness Check.*