

Course ID: TGS-2023040923

Prospecting and Engaging High-Net-Worth Individuals



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SKILLSFUTURE
SUBSIDIES + CREDIT

[View Course on SSG](#)



[Virtual Workshop Dates](#)

Duration

Five Half—Days | 15 Hours

Training Format
Virtual - Zoom



Full Fee

\$981

*Net Fee

\$351*

* Terms & Conditions applies. Refer to next page for funding eligibility

Course Overview



Acquiring HNW clients using Private Banking Strategies

- **Examine** the investment perspective of HNW clients and engage them using their language and lingo.



Building trust with HNW by understanding their needs

- **Question** HNW strategically to help clients uncover their requirements beyond financials.



Connecting and partnering HNW as their Trusted Advisor

- **Establish** your position as the HNW's go-to trusted and holistic advisor.

Target Audience

- Individuals aged 24 and above.
- Diploma Holder.
- A minimum of one year's working experience in supervisory role

Proven Track Record

- 40% of participants have improved **BUSINESS RESULTS!**.
- Over 150,000 participants have benefited from our courses!

Why are Private Bankers able to acquire HNW client so easily?

UNLOCK PRIVATE BANKER'S SECRET FORMULA

Elevate Your Real Estate Business: Master the Art of Attracting Luxury Buyers with this Exclusive Realtor Workshop!

Learning Outcomes



Become the go-to agent for high-net-worth clients

Effective in getting successful leads

Proven winning formula to increase revenue



More tools and tips to become the next top agent!

Other Sales Workshops Available:

- ✓ Mastering High-Net-Worth Customer Relationships
- ✓ Win-Win Strategic Negotiation



Visit eli.academy for more info

Assessment Method

Written Exam | Case Study

Technical Skills and Competency

Customer Acquisition Management

Course Outline

At the completion of the course, e-certificate will be awarded to trainees who have demonstrated competency in the WSQ assessment and achieved at least 75% attendance.

Principal Trainers



Bernard Soo



Renee Chong

<p>Session 1</p> <p>10.00 AM – 1.00 PM</p> <p>Understanding the Mindset of HNWI Individuals</p> <ul style="list-style-type: none"> Mindset of HNWI 7 Types of HNWI Client & Engaging Them Introduction to Customer Acquisition Strategies Consultative Selling Approach Advisory Model 	<p>Session 3</p> <p>10.00 AM – 1.00 PM</p> <p>Engaging and Connecting with HNWI Individuals</p> <ul style="list-style-type: none"> Helping Clients Buy & Objection Handling Strategic Questioning – Questioning Loop Crafting Strategic Questions- HCF
<p>Session 2</p> <p>10.00 AM – 1.00 PM</p> <p>Positioning Yourself and Building Trust with different types of HNWI Individuals</p> <ul style="list-style-type: none"> 7 Steps to Acquire New Customers - Developing a customer acquisition strategy Effective Client Conversations <ul style="list-style-type: none"> Elevator Pitch Establishing Trust – Trust Formula 3 Types of Client Conversations 	<p>Session 4</p> <p>10.00 AM – 1.00 PM</p> <p>Establishing a Customer Acquisition Plan & Evaluating Metrics</p> <ul style="list-style-type: none"> Developing a Customer Acquisition Operational Plan Identifying Key Performance Indicators Evaluating Cost of Customer Acquisition Emerging Trends on Customer Acquisition
	<p>Assessment</p> <p>10.00 AM – 1.00 PM</p> <p>Written Assessments</p> <ul style="list-style-type: none"> Short Answer Questions Case Study <p>Feedback on Assessment</p>

Course Fee & Funding | *Funding valid till: 22-12-2025*

Course Fee and Government Subsidies		
	Self-Sponsored/ Company Sponsored (S\$)	
	Before GST	With GST
Non-SCPR	900	981
SCPR 21 Years Old and Above	450	531
SC 40 Years Old and Above	270	351

Baseline: Singaporean/PR age 21 and above | MCES(Mid-Career Enhanced Subsidy): Singaporean age 40 & above

SkillsFuture Enterprise Credit (SFEC)

Eligible Singapore-registered companies can tap on \$10,000 SFEC to cover out-of-pocket expenses.

Visit this link for SkillsFuture Credit information

www.skillsfuture.gov.sg/sfec

SkillsFuture Credit

Eligible Singapore Citizens can use their SkillsFuture Credit to offset course fee payable after funding.

Visit this link for SkillsFuture Credit information

www.skillsfuture.gov.sg/initiatives/mid-career/credit

Fee Details

Self-sponsored Individual

www.skillsfuture.gov.sg/funding-individuals

Employers

www.skillsfuture.gov.sg/funding-employers

Register Today!

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SUBSIDIES + CREDIT

[View Workshop Dates](#)

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Entrepreneur Leadership Institute



[eli.academy.sg](https://www.instagram.com/eli.academy.sg)



ELI Academy

Principal Trainers

Bernard Soo

Founder – Entrepreneur
Leadership Institute



- Bernard is an accomplished professional with over 17 years of experience in the banking and wealth management industry. For the past 7 years, Bernard has been serving high-net-worth individuals across the region in a frontline capacity, providing exceptional service and support. With over 10 years of senior management experience, Bernard has designed and executed successful wealth propositions and equities product management strategies.
- During his time at Standard Chartered Bank, Bernard served as Head of Wealth Proposition, where he was responsible for designing and implementing various propositions aimed at providing comprehensive financial planning services to clients. This included retirement planning, children education, legacy planning, and accredited investor propositions for high-net-worth individuals. Additionally, Bernard was the Head of Online Equities Trading platform, where he oversaw product management, business strategy, and online equities business management.
- At UOB, Bernard served as Head of Digital Wealth Proposition and was the Product Owner of UOB Roboadvisers, Simple Invest, and Simple Insure. He was also the Business Lead representing UOB in the MAS-driven Open Banking initiative, playing a pivotal role in driving the bank's digital transformation efforts.
- Bernard is also an active contributor to the CitaDAO DeFi Property Tokenising platform. He was previously an Executive Committee Member in the Singapore Fintech Association, representing the Fintech community in Singapore. With over 5 years of experience in Fintech providing consultation and product development, Bernard is an expert in emerging technologies, and he has been conducting outreach and training on these topics for the past 3 years.

Renee Chong

CEO – Entrepreneur
Leadership Institute



- Renee is a seasoned educator and policy maker with more than 16 years of experience in Singapore's education landscape. Her deep understanding of education policy, coupled with her strong leadership skills, makes her an invaluable asset to any organization.
- Throughout her career, Renee has held various key positions within the Ministry of Education, including Lead Manager in the Higher Education Policy Division and Head of Department for Integrated Curriculum in Junior College. In these roles, she led teams responsible for the development of innovative curriculum and educational policies.
- Renee's ability to manage teams effectively has allowed her to coordinate with different stakeholders in the education sector, including local and overseas industry partners, educators, parents, and students. By aligning curriculum and policies with the needs of the education sector and the future of Singapore, she has helped to shape a more dynamic and competitive education landscape.
- With her extensive experience as an educator and policy maker, Renee is adept at navigating the complex education policy landscape in Singapore. Her expertise and leadership skills make her a valuable asset to any organization seeking to develop innovative education policies and curriculum that meet the needs of students, educators, and the wider community.

Contact Us:

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