

TGS-2023040923

Prospecting and Engaging High-Net-Worth Individuals

Beyond Financials: Building Lasting Relationships

Learn the secrets of private bankers to acquire and engage high-net-worth clients, elevating your business with proven strategies.

🕒 2 Days

🕒 14 Hours

🏠 In-Person Workshop

Full Fee

\$981

*Net Fee

\$ 351



[Scan to View
Course Details](#)

* Refer to next page for funding eligibility

Key Strategies



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.



Access the HNW Inner Circle and Secure Your Position

Elevate your business by mastering the art of attracting high-net-worth (HNW) individuals. This exclusive workshop is designed for professionals who want to become the go-to expert for HNW clients.

You'll unlock a private banker's secret formula for acquiring HNW clients. The course focuses on a proven winning formula to increase revenue and get successful leads. You will learn how to build trust with HNW individuals by understanding their needs, and how to use strategic questioning to uncover their requirements beyond financials. The goal is to establish yourself as your client's trusted, holistic advisor.

Discover How to
Prospect and Engage
High-Net-Worth
Individuals

Strategic Communication

Learn to engage and connect with HNW individuals by using their specific language and lingo. Develop the skill of strategic questioning to help clients uncover their needs beyond just finances

Building Trust & Rapport

Build trust with HNW individuals by understanding their unique needs. Master effective client conversations and learn objection handling techniques. This approach helps you position yourself as a trusted and holistic advisor.

Proven Acquisition Strategies

The course offers a proven winning formula to increase revenue and get successful leads. You will learn to develop a customer acquisition operational plan and identify key performance indicators.

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Course Outline (In-Person)

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.

Day 1

Session 1

Introduction to Customer Acquisition Management

- Mindset of HNWI
- Introduction to Customer Acquisition Strategies
- Consultative Selling Approach
- Advisory Model
- Introduction to 7 Steps to Acquire New Customers
- Challenges in Acquiring New Customers

Customer Acquisition Strategy

- 7 Steps to Acquire New Customers - Developing a customer acquisition strategy
- Effective Client Conversations
- Elevator Pitch
- Establishing Trust – Trust Formula
- 3 Types of Client Conversations
- Strategic Questioning - Questioning Loop
- Crafting Strategic Questions – HCF

Day 1 (cont.)

Session 2

Operational Plan Development

- Importance and Best Practices of Written Plans
- Customer Acquisition Operational Plan

Day 2

Session 3

Evaluate Customer Acquisition Management

- Setting Key Performance Indicators
- Collate & Report Customer Acquisition Data
- Customer Acquisition Cost (CAC):
- Emerging Trends in Customer Acquisition
- Customer Relationship Management (CRM) Systems
- Identifying & Setting Key Performance Indicators

Day 2 (cont.)

Assessment

Written Assessments

- Short Answer Questions (60 mins)
- Case Study (90 mins)

Course Conclusion

Course Fee and Government Subsidies

	Self-Sponsored / Company Sponsored (S\$)	
	Before GST	After GST
Foreigner	900	981
Singapore Citizen 25-39 years old & Singapore PR	450	531
Singapore Citizen 40 years old & above	270	351

Course Support

- SFC (SkillsFuture Credit) claimable, including GST
- SFEC claimable for eligible Singapore-registered companies
- PSEA claimable

Applicable SSG Grant

- SkillsFuture Funding (Baseline)
- SkillsFuture Mid-career Enhanced Subsidy
- SkillsFuture Enhanced Training Support for SMEs

Fee Details

Self-Sponsored Individual

https://www.myskillsfuture.gov.sg/content/portal/en/career-resources/career-resources/education-career-personal-development/SkillsFuture_Credit.html

Skillsfuture Enterprise Credit information (SFEC)

<https://skillsfuture.gobusiness.gov.sg/support-and-programmes/funding/skillsfuture-enterprise-credit-sfec>

Employers

<https://skillsfuture.gobusiness.gov.sg/support-and-programmes/funding>