

How can we make impact



## ELITE SERVICES IN PRIVATE BANKING

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This program is designed to enhance your skills and achieve excellence in the field of private banking through a comprehensive learning experience in partnership with the globally renowned HEC Paris Business School. Over five intensive days in Paris, you will learn advanced strategies from world-class experts and leaders in wealth management, focusing on building strong, long-term relationships with high-net-worth clients while addressing their unique and sensitive financial needs. The program also offers an exclusive opportunity to participate in field visits to leading global financial institutions, allowing you to gain insights into best practices in the industry. This program is an investment in your professional future, equipping you with the tools and skills needed to elevate your services and drive the success of your team and organization.

### Target Competencies

- Managing Client Relationships
- Wealth Planning and Asset Allocation
- Ethics, Compliance and Risk Management
- Private Banking Trends

### Target Audience

- Private Bankers
- Wealth Managers
- Financial Advisors
- Compliance Officers for Private Banking
- Relationship Managers

### Learning Outcomes

- Developing skills in building and strengthening strong, long-term relationships with high-net-worth clients, understanding their unique needs and aspirations.
- Gaining expertise in crafting comprehensive financial strategies that meet clients' long-term financial goals and enable them to build a sustainable financial legacy.
- Staying adaptable and informed about the latest trends and technologies in private banking and adjusting to the ever-evolving industry landscape.
- Joining an elite community in the world of private banking by building a strong network with prominent experts and leaders in the field.
- Gaining valuable insights from the experienced faculty at HEC Paris.



18,400 SAR



19 May 2025

**Olivier Bossard**  
Professor of Finance

**Pierre Blanchet**  
Head of Retail Investment Solutions at Amundi

**Jérémie Vuillard**  
Managing Director & Continental Europe Head of Cross Trading

**Jean-Charles Bertrand**  
Head of Multi Asset at HSBC Global Asset Management

Monday, May 19, 2025 <i>HEC Paris Château</i>	Tuesday, May 20, 2025 <i>HEC Paris Château</i>	Wednesday, May 21, 2025 <i>HEC Paris Château</i>	Thursday, May 22, 2025 <i>Company Visit</i>	Friday, May 23, 2025 <i>Company Visit</i>
Introduction to Program <b>Olivier Bossard</b>	Key Learnings Review	Key Learnings Review		<b>Company Visit:</b> Citéco, Banque de France Museum
Private Banking: Macro-Economics Environment  Investment Perspectives  <b>Pierre Blanchet</b>	Investment Service Across Wealth Management  Private Banking Business Models  <b>Jérémie Vuillard</b> <b>Olivier Bossard</b>	Private Banking Landscape in Switzerland  Building and Managing Client Relationships  <b>Damien Gautrot</b> <b>Olivier Bossard</b>	<b>Company Visit:</b> Worldline, Innovation & Experience Centre	Conference by the Honorary General Director of Banque de France  <b>Marc-Olivier Strauss Kahn</b>
Lunch	Lunch	Lunch	Lunch	Lunch
Asset Management Foundations  Portfolio Construction and Strategic Asset Allocation  <b>Jean-Charles Bertrand</b>	Ethics in Banking Compliance and Risk  <b>Delphine Mourot</b>	Portfolio Management for Private Banking  FX Risk Hedging for HNWI Portfolio  <b>Denis Pantel</b> <b>Olivier Bossard</b>	<b>Company Visit:</b> Société Générale	Asset Allocation Solutions for Private Banking  Alternative Investments for UHNW  <b>Clément Grillet</b> <b>Olivier Bossard</b>
				Closing Ceremony



# HEC Paris

For over 140 years, HEC Paris has been guided by five fundamental values: Excellence, Curiosity, Entrepreneurial Spirit, Responsibility, and Diversity. These principles shape its mission to transform business and society through cutting-edge research, world-class education, and real-world impact.

## A Prestigious Business School: THINK, TEACH, ACT

Having an IMPACT - not only on business but on society as a whole - is the primary vocation of HEC Paris. Our school must draw on its three priceless assets to achieve this, which are also its pillars of excellence: research, education and action. The three-part motto, THINK, TEACH, ACT which is at the heart of HEC's mission.



## HEC Paris Executive Education

HEC Paris is consistently ranked among the world's top business schools, with its Executive Education programs ranked #1 globally by the Financial Times. This recognition reflects the institution's ability to shape high-impact leaders across industries, empowering them with the knowledge and vision to excel in an ever-evolving business landscape.

## History of HEC Paris

HEC Paris, founded in 1881 by the Paris Chamber of Commerce and Industry, is one of France's oldest elite higher education Grandes Ecoles. Throughout its 130-year history, HEC Paris has attracted talented, innovative, open-minded, entrepreneurial and ambitious individuals.



## Connecting and Learning.

Though it comes from within, transformation often requires a catalyst. And for many business leaders, the Financial Academy (FA) professional training programs and development activities have been that catalyst. Here, you're fully immersed in a transformational living-learning experience, networking with gurus from around the world, and engaging in programs led by prominent local and international financial industry experts . It's a holistic experience that will enrich and develop your career - and your life.

### ADMISSIONS

We admit candidates to specific sessions on a rolling space available basis, and encourage you to apply as early as possible. Although most programs have no formal educational requirements, admission is a selective process based on your professional achievement and organizational responsibilities.

### FOR MORE INFORMATION

<https://fa.gov.sa/en?language=en>

### FOR A PERSONALIZED CONSULTATION

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