



## ABA eLearning FOR PRIVATE BANKERS

Private bankers offer personalized banking services to high-net-worth individuals. They provide deposit, lending, and investment advice through a team of bank experts to consistently deliver financial solutions that meet a client's goals. Private Bankers are able to identify referral opportunities across all service lines including Investment, Brokerage, Insurance, Financial Planning, and Credit.

Private Bankers require strong credit, underwriting, and loan structuring skills and must be able to analyze financial statements. They must demonstrate in depth knowledge of banking issues and how they impact their clients. In addition, private bankers must possess a high degree of effective relationship management skills.

ABA eLearning offers a select group of courses that address the Core Knowledge needs of Private Bankers, as well as additional courses designed to deliver the knowledge and skills required to be a successful Private Banker

### Core Knowledge

- Private Banking and Wealth Management – An Introduction
- Private Banking and Wealth Management – Financial Planning
- Private Banking and Wealth Management – Overview of Investing
- Private Banking and Wealth Management – Relationship Management
- Private Banking and Wealth Management – Techniques of Investing
- Asset Classes Part I
- Asset Classes Part II
- Asset Allocation – An Introduction
- Mutual Funds – An introduction
- Mutual Funds – Investing

### Management and Leadership

- Performance Management
- Managing Employee Relations

### Regulatory Compliance

- Bank Secrecy Act
- Sexual Harassment in the Workplace for Managers
- Truth in Lending Act – Reg Z Overview
- Trust in Savings Act – Reg DD
- USA PATRIOT Act

### Sales and Customer Service

- Relationship Selling to Small Business Customers
- Revitalizing Customer Service
- Servicing and Growing Small Business Relationships

### Workplace Fundamentals

- Improving Productivity
- Presentation Skills