Global wealth institute

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The program offers classroom and online learning and includes action learning projects that managers can use to increase the value they offer their customers. Core content in each program includes: Business Acumen and Investments Leadership and Client Skills Citi Strategy and Expert Perspectives Each program includes academic leaders and investment experts who help participants explore and analyze the customer mentality to improve relationship building. The feedback has been fantastic from the RMs and FAB's who participated in the Wharton program, said Venu Krishnamurthy, head of U.S. Citi Personal Wealth Management. They return with deeper knowledge and sharper skills, but also with the conviction that this is going to make a difference for their customers and their practice. Participants like Gary Wei, a financial adviser at Citi based in Canyon Country, Calif., emphasize the value of the Institute for his career development journey. This program sets Citi apart from its competitors, says Wei. You often see banks investing in marketing, industries and products. But to see Citibank reinvest in its people underscores a commitment to career development and customer focus that is unmatched by our competitors. For Miguel Martinez Ferretti, the bank in charge for the Citi | Wharton Global Wealth Institute: The future at Citi lies with our people, which means that talent is our greatest asset. It's not just something we say; It's something we do because we've seen it work. This program takes talented RMs and FA's and gives them a chance to grow both personally and professionally. It is an opportunity to expand their careers while boosting the business growth and financial success of our customers. In 2017, 482 participants participated in the Citi | Global Wealth Institute Participants gained significant new business/investment insight and people skills, thereby to take a more holistic view of relationship management relationship management relationship relationship managers remain committed to Citi, as evidenced by the strong retention story Year One participants have dramatically increased their productivity, growing revenue in key accounts To figure out how Wharton Executive Education can help your company achieve its own custom solution, please contact Client Relations – Custom Programs, +1.215.898.1776 email Do you have a question? info@globalwealthinst.com Not a member yet? Are you a member now? Now New York - Citi and the Wharton School of the University of Pennsylvania marked the third anniversary of the Citi Wharton Global Wealth Institute this month amid an ongoing expansion of its first-of-its-kind global executive education program for wealth advisors. Since its launch in October 2015, more than 1,000 Citi Relationship Managers and Financial Advisors have participated in the program. Initially launched in Philadelphia and Beijing, the program has since expanded to Mexico City, San Francisco and Cambridge. This year, the Citi Wharton Global Wealth Institute has added an exciting new program. The Citi Wharton Global Wealth Institute demonstrates Citi's commitment to both professional development and exceptional customer service, said David Chubak, Citi's Global Head of Retail Banking and Consumer Lending. Citigold attracts many of the best financial advisers in the industry, and our partnership with one of the best business schools in the world positions us to continue deepening that talent pool for years to come. When we first announced this program in 2015, our goal was to create a customized executive training experience that combined our institutional expertise with Citi's vision for the future of client-manager relationships, said Wharton School's Dean Geoffrey Garrett. The global scope of this program, and its continued expansion, reflect our commitment to providing the best asset management education to executives worldwide. Over the course of three years and 28 sessions, the Citi Wharton Global Wealth Institute has trained financial advisors and relationship managers, both on-campus and online, to deliver the best services in its class to Citi clients worldwide. Building on this success, in May 2018, Citi and Wharton introduced Excellence in Sales Leadership, a new curriculum and a series of courses for citi financial advisors and relationship managers team leaders. For Josh Haber, a New York-based financial adviser who participated in the Citi Wharton Global Wealth Institute's inaugural class, the experience gave him a renewed perspective that enabled him to better serve clients. The Wharton programme has led me to experience at Citi to see how I can best serve my clients at a time when automation and technology are changing at an ever-increasing Pace. Timothy Tc Kee, a 10-year Citi veteran Relationship Manager in Singapore who completed the advanced course in December 2016, said the program helped him improve his performance while exposing him to new ideas and colleagues. The Citi Wharton Wealth Institute not only improved my portfolio analysis skills with wealthy clients, it also helped me gain industry insights and deepen my knowledge in various specialized areas, Kee said. It also gave me the opportunity to network with fellow Citi bankers around the world to learn new and different perspectives that I enjoyed sharing with my colleagues. Enhanced wealth management with Citigold Private Client's personal wealth team STARTS WITH YOUR DEDICATED SENIOR RELATIONSHIP MANAGER To better understand your financial needs and priorities, your main contact is a dedicated Senior Relationship Manager who is a senior banker and investment expert trained through Citi | Wharton Global Wealth Institute. WITH SUPPORT FROM YOUR PORTFOLIO COUNSELOR Working with your Senior Relationship Manager, your seasoned Portfolio Counselor will help develop and consistently monitor your investment portfolio. A privilege reserved only for Citigold Private Client, our Portfolio Counselor Team of international financial advisors will take an independent review of your portfolio to conduct a portfolio review. ANALYZE YOUR INVESTMENTS WITH PORTFOLIO 360° REVIEW Your Portfolio Counselor starts with an analysis of your portfolio with a Portfolio 360° Review. They then discuss your portfolio performance with you and recommend possible changes to manage risk and improve returns, in line with your portfolio strategy. They can also perform a Portfolio Stress Test that will illustrate possible consequences through worst-case scenario simulations. EQUITY WEALTH ADVISORY As a Citigold Private Client, you will also benefit from dedicated Equity Advisory Services, where an experienced Equity Specialist will provide advice and equity trading ideas based on Citi Research. EXPERIENCED GROUP OF SPECIALISTS Also supporting your Senior Relationship Manager is an experienced group of specialists who will help you take full advantage of the exclusive asset building tools that Citigold Private Client offers. These include: Your insurance specialist To ensure that you have adequate protection for you and your loved ones. Your Treasury Specialist who can provide insights and execution in currencies, fixed income, options and short-term structured notes. Your FX Specialist who can advise you on all currency and currency solutions. Together, your asset management team can help you to give you a full picture of your and work with you to help you achieve your asset management goals. Join Citigold Private Client today with a investment of US$1,000,000 and let our asset management experts help you grow your investment portfolio. Click here for more information on what your personal wealth team can do for you. U.

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