



# International Degrees Ltd

Financial Training Academy Courses

From the Heart of the World's Main Financial Centre

The Financial  
Training  
Academy Ltd

## CerIRB An Introduction to Retail Banking

*Islamic Banking or Private Banking,  
Wealth & Portfolio Management*

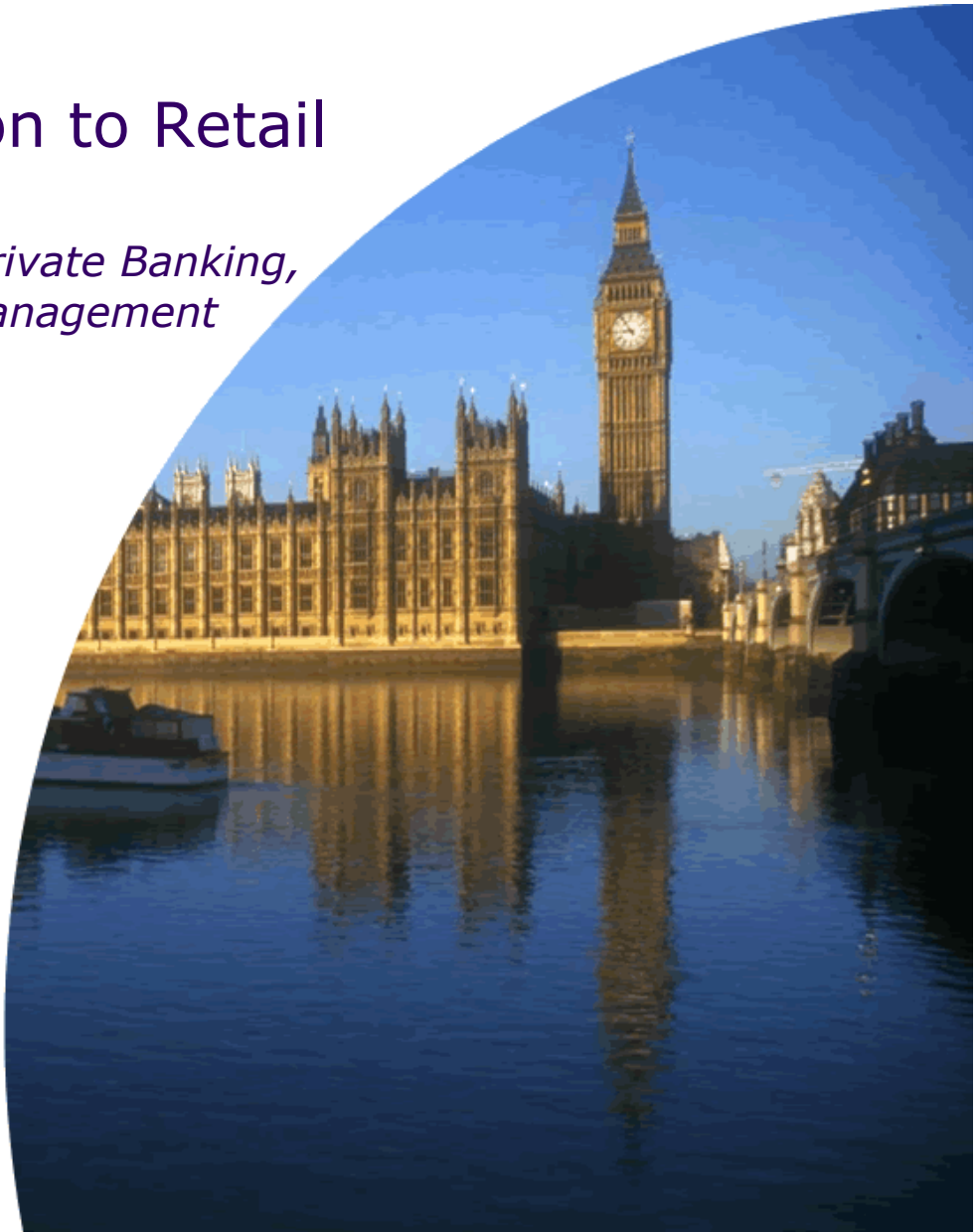
Hands on, Tutor-led  
training at:

Bank,  
City of London

4+1 Days

Including:

- Lending Facilities
- Structured & Syndicated Learning
- Requirements & Regulations
- Deposits & Distribution
- Credit Analysis & Return



## International Degrees Ltd

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**LOCAL CONTACT**

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**Course Presenter – Bob Westrip**

Robert has more than 30 years experience of corporate banking, covering a variety of senior managerial positions with Barclays Bank including Head of Corporate Business – Essex, Deputy Risk Management Director – East Anglia, Assistant Director – London and other various roles up to Associate Director – London. Since joining the bank in 1967, he has been involved in every major aspect of corporate banking ranging from funding, restructuring and financing arrangements to the development of management and information systems, leading innovative cultural and structural change programmes and training.

His business experience covers a broad industry base, ranging from SME's to blue chip clients. This included the restructuring of major corporate debts and financing arrangements for Queens Moat Houses PLC which was the largest reconstruction undertaken in the UK at the time with a debt level exceeding £1bn, requiring coordinating 108 different lenders in several countries. Robert also managed other key accounts including British Steel, Hawker Sidley and Pilkington and grew his portfolio from scratch to £5m per annum profit over a five year period

Robert has a very hands-on style and has developed and led focussed management and support teams that have delivered excellent results. He has also been actively involved in the training and development of people through various internal and external initiatives including running strategy –building sessions, coaching relationship offices, lecturing to students and SME's and mentoring under the Princes Trust scheme for young people. He left Barclays in 2000 and is currently involved in a number of different business initiatives.

**An Introduction to Retail Banking**

This 5 day (4+1) course will provide an introduction into retail banking and the main types of transaction undertaken to enable new entrants to gain a general understanding of the market, including:

- Liabilities
- Retail Asset Products
- Secured and Unsecured Lending
- An Introduction to Credit Cycle

**Management**

- The Role of Regulatory Authorities
- Acquisition

With the extra day including either

- Islamic Banking or
- Private Banking & Wealth Management

**Why Attend?**

There is an enormous and growing market for retail banking across the world and a need for the skills necessary to manage that process. As more people seek to protect and grow their wealth, that need will show a commensurate growth in retail banking

**Who Should Attend?**

- New entrants into retail banking
- Suppliers to the retail banking industry

**Training Methodology**

The learning format is to adopt a mixture of structured lectures, delegate discussions and practical case studies. The practical case studies will enable the delegates to work with real life examples and appreciate the importance of analysis, risk and control.

**Course Level**

This is an introductory class. While some basic background knowledge of investments would be beneficial, the course will commence with the basic concepts.

**Optional DAY 5 – Private Banking, Wealth & Portfolio Management**

**Course Description**

This course offers an opportunity for staff starting in private banking / private wealth management to equip themselves with the skills to understand the techniques used to manage their clients' wealth.

**Learning Objectives**

Upon the completion of this training event participants will have gained knowledge of

- The basic elements of private banking, wealth and portfolio management
- Asset allocation and portfolio structuring techniques
- Structured products and solutions for private banking clients
- Risk reduction and return enhancement opportunities and strategies

**Who Should Attend**

- Staff entering Private Banking and Asset Management
- Employees in legal and accountancy practices working with private bankers
- Legal & Trust Staff
- Branch staff and Credit Officers who need to understand the complementary nature of private banking services
- Service Providers

**Teaching Methodologies**

Classroom lectures and interactive practical workshop formats.

**Pre-requisites**

Some knowledge of the financial services industry will be an advantage.

**4 + 1 Days**  
**£650 per Day\* + VAT**  
\*Promotional Price

