



WILLIE KENG
& ASSOCIATES PTE LTD

CASE STUDY

Improving Investment Performance for Private Wealth

A senior investment counsellor for a well-established European private bank needed to expand his knowledge in advising on bond investments. The client is already adept with various private wealth instruments including structured products, funds and equities. Our goal was to help increase his investment performance to meet clients with major fixed income portfolios of around US\$10 million to US\$50 million.

Our performance coaching program focused on developing his ability to advise private clients, leveraging on various portfolio strategies and bond ideas.

We worked on some key objectives to help him succeed:

- Created a training program to develop his ability to advise his private clients in fixed income investments.
- We catered a new approach of bond strategies and tactical ideas to develop his bond advisory skills.
- Presented and redefined the role of how a fixed income advisor should engage private clients holding major bonds portfolio.
- Weekly and bi-weekly sessions allow constant feedback.

During the program, the investment counsellor received positive feedback from both his relationship manager and end client of a US\$40 million portfolio, on the advice he has given. He solidified his position as an expert and gained the trust of his private client in providing holistic investment advice. The relationship manager and private client has agreed to continue engaging his advisory services in the bank.

