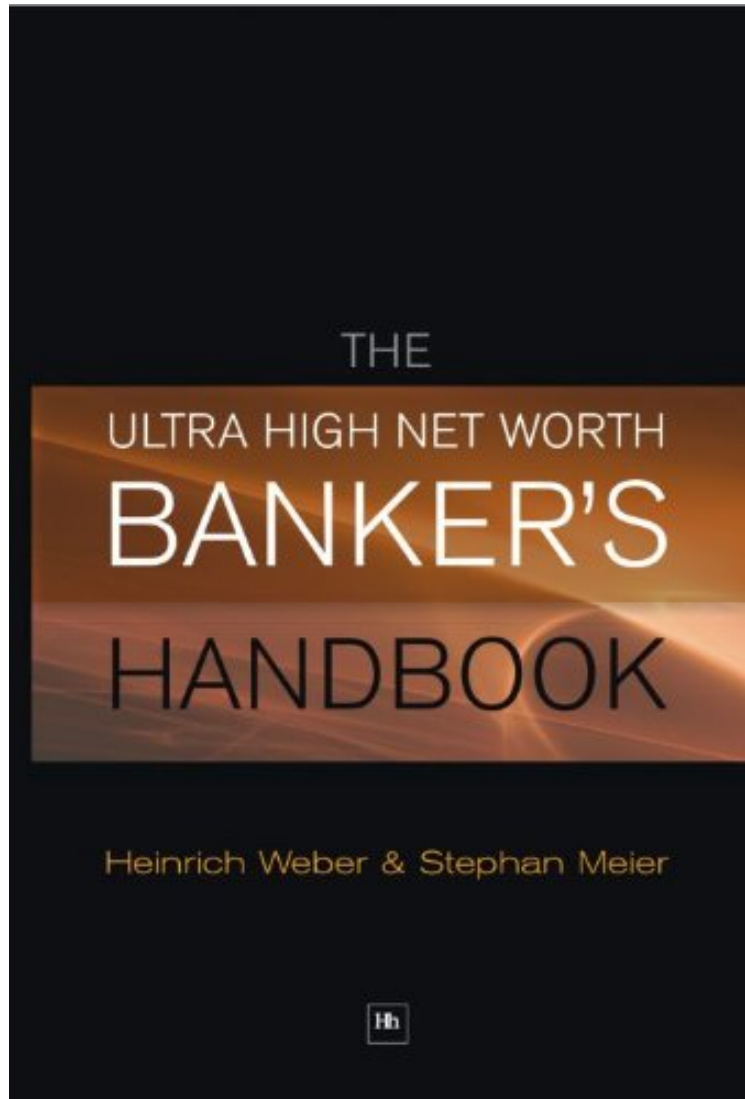


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# The Ultra High Net Worth Banker's Handbook

*Stephan Meier*

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**Stephan Meier : The Ultra High Net Worth Banker's Handbook** before purchasing it in order to gage whether or not it would be worth my time, and all praised The Ultra High Net Worth Banker's Handbook:

3 of 4 people found the following review helpful. excellent!By Daniele MellanaThe Ultra High Net Worth Banker's handbook sheds light on a niche in banking, namely the work with the wealthiest clients (the UHNWIs). The needs of those clients are obviously very demanding and include wealth structuring, wealth management and corporate finance.By using examples and case studies, the book systematically explains the different components of UHNW banking in a very clear way. I particularly liked the practical approach, based on the authors' vast experience in the field. Furthermore, not only the technical skills needed by the professional working with this client segment are described in detail, but also the very important soft skills are made understandable to the reader in a very structured

way. For the reasons mentioned above, I give the book a 5 star rating and highly recommend it for anyone working in the private banking sphere or any other financial area where client relations are vital to the business.

Estimates show that there are around 20,000 Ultra High Net Worth individuals in existence today, each with bankable assets in excess of \$50 million. Between them they possess a wealth of \$5,000 billion, 10% of the world's estimated total wealth. The UHNW wealth management business is therefore a critically important as well as complex part of modern finance. It exists within a "client-banker-bank" triangle and is influenced by serious exogenous factors in political, economic and fiscal environments, as well as by numerous emotional, familial and personal dimensions. In this book the authors address these complex relationships, serving as guides and advisors for UHNW bankers, banks and clients alike. The authors' clients have taught them that the three major frustrations for private banking clients are bad performance, bad communication with the banker, and confusion in the face of poorly explained financial processes. In the first part of the book the authors offer their expert solutions to these problems and, in the second, help to eliminate confusion by explaining UHNW financial processes as clearly and simply as possible. The authors mix authoritative advice, gained from long careers in wealth management, with anecdotes and narrative, to make the book approachable as well as informative. The book also contains five major case studies that help to exemplify certain elements involved in UHNW banking across the world, including the importance and impact of: family values and governance; client confidence and connections; cultural and religious considerations; philanthropy; market crises and volatility; portfolio diversity and enterprise management. This book is for private bankers who work or aim to work in the Ultra High Net Worth field, the most sought-after and secluded high-end client segment of private banking and wealth management. For UHNW clients, this book is a guide on how to deal with your bankers and what you can expect from them, depicting the view from the other side of the table. And for the management of a private bank or private banking division of a financial institution, this book will serve as an essential introduction on how to improve performance. Expert, in-depth and accessible, *The Ultra High Net Worth Banker's Handbook* is the ultimate guide to this area of modern finance.

About the Author Heinrich Weber, as an executive vice president, advises Ultra High Net Worth (UHNW) clients at one of the leading firms of Swiss private bankers. Prior, Heinrich, 45, was responsible for a team of UHNW bankers at one of the major global wealth managers. Before joining UHNW banking, Heinrich was active in the area of derivatives trading, and was a co-founder of the pan-European options market-making firm Servisen Trading AG, where he served as CEO. Heinrich has a strong interest in finance and - together with Dr. Kermit Zieg - has published a guide about Point-and-Figure charting and a book about non-directional trading strategies. Stephan Meier, 48, has specialised in UHNWI clients since 2002. He currently heads the private banking UHNWI practice of one of the global leaders in this area and prior to that he was head of key clients for a major region at another global wealth manager. He has also been the country team head of Latin America for two internationally operating banks. Before focusing on private banking, Stephan spent 17 years working for a globally operating Swiss manufacturer and distributor of products that capture, model, analyse and visualise spatial information. He held various senior positions - including managing director, senior consultant and area sales manager - in different legal entities of the group, both in Switzerland and in Latin America, where he built up a strong network. Heinrich Weber, as an executive vice president, advises Ultra High Net Worth (UHNW) clients at one of the leading firms of Swiss private bankers. Prior, Heinrich, 45, was responsible for a team of UHNW bankers at one of the major global wealth managers. Before joining UHNW banking, Heinrich was active in the area of derivatives trading, and was a co-founder of the pan-European options market-making firm Servisen Trading AG, where he served as CEO. Heinrich has a strong interest in finance and - together with Dr. Kermit Zieg - has published a guide about Point-and-Figure charting and a book about non-directional trading strategies. Stephan Meier, 48, has specialised in UHNWI clients since 2002. He currently heads the private banking UHNWI practice of one of the global leaders in this area and prior to that he was head of key clients for a major region at another global wealth manager. He has also been the country team head of Latin America for two internationally operating banks. Before focusing on private banking, Stephan spent 17 years working for a globally operating Swiss manufacturer and distributor of products that capture, model, analyse and visualise spatial information. He held various senior positions - including managing director, senior consultant and area sales manager - in different legal entities of the group, both in Switzerland and in Latin America, where he built up a strong network.