

**NATIONAL UNIVERSITY OF SINGAPORE
NUS Business School
Department of Marketing**

MKT3422A WEALTH MANAGEMENT MARKETING

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COURSE DESCRIPTION

This course is designed to introduce students to the world of wealth management marketing, and to give them an in-depth understanding of the challenges and complexities of marketing in a highly regulated and rapidly evolving industry. Students will get practical insights into the use of marketing applications in product, segment and service marketing in the retail, affluent and private banking sectors. It aims to hone their skills to improve the effectiveness of the marketing strategies, techniques and programs to meet the demanding priorities of the client, the business and the regulators in this fast-changing and regulated landscape.

COURSE OBJECTIVES

The objectives of the course are to ensure that students:

1. Acquire a sound understanding of the marketing environment and framework in a highly regulated, complex and constantly evolving industry
2. Develop the requisite skills and competencies to analyze, critique and create client-centric marketing
3. Inculcate the importance of a disciplined and responsible approach in wealth management marketing

The course will be based on a combination of lectures, discussions, case studies and group project work. Real-case examples will be discussed throughout the course. Special guest speakers who are industry leaders in private banking and affluent banking will be invited to share their experiences and perspective. This will help students develop a balanced understanding of textbook marketing with real-life implementation.

EXPECTATIONS

As the course emphasizes on students developing a practical marketing approach using current, real-life examples, students will benefit most from the open discussions and dialogue during lectures, case studies and group discussions.

Students should be prepared to be highly involved in these discussions as they will benefit not only from the exchange but they will also learn how to present their views to win over their key stakeholders.

Students are also expected to work in a group project where assessment will be made. Based on quality of work, timeliness in delivery and the ability to work in a team, which is a crucial factor to making marketing impactful in the working environment.

READINGS

There is no required textbook. You are free to use any marketing textbook you like. Additional materials will be provided during the course.

ASSESSMENT METHODS

Class Participation	15%
Case Studies	
- Individual	10%
- Group	10%
Group Assignment	40%
Final Test	25%
TOTAL	100%

Class Participation (15%)

Grading will be based on the quality of class engagement, the feedback and comments on the topic under discussion, open and effective responses to questions, active participation in class discussions. Positive attitude towards group participation is also important, and distractions caused through use of cell phone, tablet or laptop will have a negative impact on participation marks.

Case Studies (20%)

Grading will be given on both an individual basis as well as on group participation and interaction. These will be based on:

- 1) Individual contribution to the quality of inputs in case studies discussions
- 2) Active participation and involvement of all members in the group discussions

Group Assignment (40%)

- 1) Assessment will be based on quality of final output
 - creativity and initiative
 - flawless execution
 - impactful presentation and delivery
 - effective application of marketing techniques
- 2) Group participation during the project and in the final presentation

Quiz (25%)

There will be a final test in the last session.

ACADEMIC HONESTY & PLAGIARISM

Academic integrity and honesty is essential for the pursuit and acquisition of knowledge. The University and School expect every student to uphold academic integrity & honesty at all times. Academic dishonesty is any misrepresentation with the intent to deceive, or failure to acknowledge the source, or falsification of information, or inaccuracy of statements, or cheating at examinations/tests, or inappropriate use of resources.

Plagiarism is 'the practice of taking someone else's work or ideas and passing them off as one's own' (The New Oxford Dictionary of English). The University and School will not condone plagiarism. Students should adopt this rule - You have the obligation to make clear to the assessor which is your own work, and which is the work of others. Otherwise, your assessor is entitled to assume that everything being presented for assessment is being presented as entirely your own work. This is a minimum standard. **In case of any doubts, you should consult your instructor.**

Additional guidance is available at:

<http://www.nus.edu.sg/registrar/adminpolicy/acceptance.html#NUSCodeofStudentConduct>

Online Module on Plagiarism:

<http://emodule.nus.edu.sg/ac/>

LECTURE SCHEDULE

Session	Lecture Topics	Activities
1	Course introduction Introduction to Wealth Management Marketing Challenges involved in WM marketing	Getting to know you Form into groups
2	The Wealth Management Marketing Landscape	Class discussion
3	Understanding the 4 P's in Wealth Management marketing (Part 1)	Case study discussion
4	Understanding the 4 P's in Wealth Management marketing (Part 2)	Case study discussion Guest speaker
5	Channel Marketing	Case study discussion Introduce group project
6	Segment Marketing (Part 1)	Case study discussion
7	Segment Marketing (Part 2)	Case study discussion
8	Marketing Intelligence	Guest speaker
9	The Must-Do's in Wealth Management Marketing	Group discussion
10	Integrated Marketing	Guest speaker
11	Making Impactful Marketing	Group discussion
12	Project Presentations	Project Groups
13	Recap and Review Future of Wealth Management Final test	Guest speaker