Record Nr. UNINA9910388646303321 Autore Chorafas Dimitris N Titolo Wealth management [[electronic resource]]: private banking, investment decisions and structured financial products / / Dimitris N. Chorafas Oxford;; Burlington, MA,: Butterworth-Heinemann, 2006 Pubbl/distr/stampa **ISBN** 1-280-64242-4 9786610642427 0-08-046164-6 Edizione [1st edition] Descrizione fisica 1 online resource (391 p.) Collana Elsevier finance Disciplina 332.632 Soggetti Structured notes (Securities) Private banks Financial engineering Electronic books. Lingua di pubblicazione Inglese **Formato** Materiale a stampa Livello bibliografico Monografia Description based upon print version of record. Note generali Includes bibliographical references and index. Nota di bibliografia Nota di contenuto 1. Private banking defined -- 2. Know your customer and his or her profile -- 3. Business opportunity: fees and commissions from private banking -- 4. Risk and return with investments -- 5. Asset management defined -- 6. Business models for asset management --7. Outsourcing and insourcing wealth management -- 8. Trust duties and legal risk -- 9. Derivative financial instruments defined -- 10. Structured financial products -- 11. Controlling the risk taken with structured products -- 12. Fixed income structured products -- 13. Practical examples with fixed income derivatives -- 14. Equity-type structured products -- 15. Practical examples with equity-type derivatives -- 16. Currency exchange structured products -- App. Derivatives as a tax haven. Sommario/riassunto This book has two themes: Private Banking and investment decisions regarding Structural Financial Products. Dr. Dimitris Chorafas examines in a rigorous way whether structured financial products are advisable investments for retail and institutional investors and, if yes, which risks

they entail. As our society becomes increasingly affluent, and state-

supported pension schemes find it difficult to survive, a growing number of high net-worth individuals, and families, have become retail investors - looking for ways and means to optimize wealth management, and Private Banking deals with these so