

# Behavioral Finance & HNI Retention Training

For PMS, AIF, family office & private wealth teams — investor psychology, drawdown communication & client retention.

## Overview

Premium behavioral finance & HNI retention training for PMS, AIF, family office and private wealth teams. **HNI's don't redeem because of markets — they redeem because of silence.** This program builds investor-communication capability, not sales scripts.

## Who It Is For

- PMS & AIF platforms
- Family offices
- Private wealth desks
- AMC HNI teams
- HNI advisory teams & senior RMs
- Boutique & founder-led wealth firms
- New RM onboarding cohorts
- Drawdown / review-season prep

## The Retention Framework

- **Pre-Commitment Conversations** — set expectations before volatility arrives
- **Drawdown Communication** — speak during underperformance without sounding defensive
- **Silence-Risk Mapping** — spot clients quietly moving toward redemption
- **Decision Framing** — shift from return-chasing to objective, horizon & suitability
- **Relationship Rhythm** — structured follow-ups & proactive communication

## Program Modules

### MODULE 01

#### Investor Psychology in Volatile Markets

Loss aversion, recency bias, regret, anchoring, panic behaviour.

### MODULE 02

#### HNI Redemption Triggers

Why affluent clients exit before the thesis plays out.

### MODULE 03

#### Drawdown Communication Scripts

How to speak during underperformance with clarity and structure.

### MODULE 04

#### Portfolio Review Behaviour

Reviews that explain context, not just numbers.

### MODULE 05

#### Family & Second-Opinion Pressure

When spouses, children or other advisors enter the decision.

### MODULE 06

#### Retention Operating System

Follow-up rhythm, segmentation, red-flag mapping.

## Engagement Formats

- **90-Minute Leadership Session** — founders, CIOs, senior wealth leaders
- **Half-Day RM Workshop** — private wealth & PMS/AIF teams
- **3-Part Behavioral Finance Series** — deeper capability building
- **Custom HNI Communication Lab** — role-play, cases & simulations

**The goal:** not to stop every redemption — but to reduce avoidable exits caused by poor communication, unmanaged expectations and emotional timing.

### Help your wealth team handle HNI volatility better.

Request a training outline · +91-98109-91910 · [abhishek.aggarwal@grivaacapital.com](mailto:abhishek.aggarwal@grivaacapital.com)

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