

DOHA BANK

2020

WEALTH MANAGEMENT SOLUTIONS



 بنك الدوحة
DOHA BANK

OUR PARTNER



We are partners with one of the fastest growing private banks in Asia, offering a structured and consistent approach - an open architecture product platform with robust research capabilities to deliver a total risk-based solution customised to each client's needs.

With total assets under management (AuM) of around US\$120 billion, our partner has experience in serving high net worth individuals and wealthy families in its key markets of Asia, India, GCC and Europe.

OUR OFFERING

Your journey begins with us knowing your unique priorities, needs and goals. According to your risk appetite and preferences, we may discuss and suggest bespoke solutions for you from our best-of-breed product selection based on independent tracking of a large array of funds, structured products and insurance options.



ASSET CREATION & PRESERVATION

With the right plan for your investments and proper management of your assets, you can sustain your wealth within the family for generations to come.

INVESTMENT PRODUCTS

- Cash and money markets
- Investment grade bonds
- High yield bonds
- Equities
- Foreign exchange
- Structured products
- Third party mutual funds
- Hedge funds / Private market funds
- Private equities



ASSET PRESERVATION

- Estate planning
- Financial planning
- Life insurance - Provided by external parties / insurance brokers referred by our Partner



WEALTH PLANNING

Our tailored wealth planning solutions provide enhanced strategies for your specific succession needs including catering to beneficiaries and assets located in different parts of the world and creating structures for charitable giving.

- Estate Planning
- Family governance
- Philanthropy advisory
- Trust services
- Financial planning



CREDIT SOLUTIONS

As one of our clients, you can benefit from our portfolio leveraging as well as mortgage and personalized financing options to enhance returns or improve liquidity.

Some financing options include:

- Portfolio leveraging
- Residential real estate financing in prime markets e.g. UK, Singapore, Hong Kong, etc
- Insurance premium financing
- Structured transactions



RISK PROFILING

Risk profiling will be performed to ensure that the products are in line with your investment objectives, risk appetite, investment horizon, liquidity needs, knowledge and experience.

Both the Product Risk Rating (PRR) and Client Risk Profile are divided into 5 levels, where matching of PRR against the CPR are done using the below matrix.

Client Risk Profile	Allowable PRR				
	1	2	3	4	5
1 - Conservative	✓	x	x	x	x
2 - Moderate	✓	✓	x	x	x
3 - Balanced	✓	✓	✓	x	x
4 - Growth	✓	✓	✓	✓	x
5 - Aggressive	✓	✓	✓	✓	✓
6 – Shariah Compliance is subjected to different risk profiling					





Private Banking Metal Card by invitation only
Minimum Investment Account Opening Requirement: QAR 5 Million

