

THE GLOBAL CUSTODY LEADERSHIP PROGRAMME

A BLENDED LEARNING JOURNEY FOR THE NEXT GENERATION OF CUSTODY MANAGERS

INTRODUCTION

Transform theory into action and build your personal toolkit with simulations, case studies, and hands-on workshops tailored for the real-world challenges of custody operations. Designed specifically for emerging custody leaders, this programme blends practical learning with strategic insight to drive immediate impact. From global custody fundamentals to leadership and innovation, participants will gain the tools, confidence, and playbook to lead high-performing teams in a rapidly evolving landscape.

KEY OUTCOMES FOR FUTURE CUSTODY LEADERS

- A future-ready Custody Operations Playbook including tools, frameworks, checklists you can use immediately.
- Confidence in leadership, risk, and strategic execution backed by realistic simulations.
- Enhanced capability to optimise operations, drive efficiency, and deliver value.
- A support network and implementation coaching with three months of follow-up sessions to embed success.

THE PROGRAMME AT A GLANCE (14 DAYS)

Phase 1: Virtual Academy

- **Module 1:** Strategic Overview of Custody Services
- **Module 2:** Financial Instruments & Custody Considerations
- **Module 3:** The Core of Custody Operations
- **Module 4:** The Trade Lifecycle: Clearing and Settlement
- **Module 5:** Managing Liquidity & Credit Risk
- **Module 6:** Technology, Data, and Crisis Management

Phase 2: In-Person Incubator

- Strategy & Client Solutions
- Optimising Asset Servicing & Technology
- Enhancing Operational Efficiency
- Mastering Risk & Crisis Management
- Leading a High-Performance Custody Team

The Finale

- The Shark Tank Finale

NEXT STEPS

Ready to strengthen your custody leadership capabilities? Let's partner to launch your next cohort and embed lasting impact. Get in touch to activate the journey.

PROGRAMME STRUCTURE & HIGHLIGHTS

Phase	Format	Focus	Highlights
Pre Programme Onboarding	Virtual 90-Minutes	Align expectations and establish baseline knowledge	Meet peers and faculty
Phase 1 Virtual Academy (8 days)	Live/Virtual	Foundation in custody theory	Deep dives into custody operations, instruments, risk, tech, ESG, and future trends
Phase 2 In Person Incubator (5 days)	Hands on and in Person	Practical application & teamwork	Guest speakers, simulations, and playbook development focused on strategy, efficiency, risk, tech, and leadership
Phase 3 The Finale	Virtual Shark Tank Innovation Challenge	Presentation	Teams pitch their playbook to senior leaders where innovation meets real world impact.