



“The Certified International Wealth Management course provides an opportunity to Wealth Managers working in the Financial Services Sector an all-inclusive approach where a single manager can coordinate all the services needed to manage the needs of their high net worth or ultra-high net worth clients, instead of providing pieces of advice from a series of professionals.”

Baronette Scott-Gay, CIWM

CERTIFIED INTERNATIONAL WEALTH MANAGER

Wealth management is one of the fastest growing areas within the global financial services industry. This *internationally accredited* qualification ensures that wealth managers and advisors understand the range of assets and investment products available in the local and international market.

Wealth management is more than just investment advice, as it can encompass all parts of a person's financial life. The idea is that rather than trying to integrate pieces of advice and various products from a series of professionals, high net worth or ultra-high net worth individuals benefit from a holistic approach in which a single manager coordinates all the services needed to manage their money and plan for their own or their family's current and future needs. This course is intended to create such a manager.

Assessment

Candidates in this programme will be certified after completing a 2,000 - 2,500 word assignment and a three hour comprehensive qualifying exam. The candidate will then be issued a **Certificate In Wealth Management (CIWM)**.

Program Prerequisites

Candidates to the Certified International Wealth Manager Programme must fulfill the following requirements:

- Candidates must have knowledge in accounting, college mathematics, economics, banking & finance and computer skills.
- Candidates must have a minimum of a college degree and/or 10 years plus job experience in financial services.

◇ Tuition: \$4,995 plus \$150 registration fee. Payment plans available

◇ Duration: 6 months | Learning Platform: ZOOM

How you will benefit?

- ⇒ Increases knowledge and confidence in providing expert financial advice
- ⇒ Improves client relationships
- ⇒ Assists in career development
- ⇒ Internationally recognized Certification

How your firm will benefit?

- ⇒ Highly skilled staff in wealth management
- ⇒ Ensures clients confidence that staff are highly competent to advise
- ⇒ Higher results in satisfied clients
- ⇒ Ensures firms stand out from less well trained competitors

This programme is Accredited by the Chartered Banker, UK

Wealth Management Certification Syllabus

Module I - Corporate Financial Evaluation

- DuPont Analysis-ROA and ROE and Stock Market Measurements
- International Cash flow Analysis
- Advanced Accounting Concepts-Creative Accounting
- Corporate Finance and Company Valuation Methods
- Drivers for Adding Shareholder value and modern measurements

Module II - Advanced Investment Portfolio Analysis

- Intro to Specialized Investment Instruments and Advanced Portfolio Management
- Market Risk Management and the Capital Markets -Options
- Time value of money - review day count conventions and compounding
- Money market instruments
- Interest rate swaps and pricing
- Value at risk, stress testing and back testing
- Bonds-yield curves and duration
- Hedge Funds-performance and investment
- The role of Fixed Income and Derivatives in an overall Asset allocation

Module III - Industry and Business Risk

- Industry Analysis and Economics
- Business Strategy and Competitive Positioning
- Products and Markets
- Managing for Value-Strategic Business Management
- Managing the People using the Balanced Scorecard

Module IV - Corporate Governance and Wealth Management

- Corporate Governance - principles and practice
- Legal and regulatory corporate governance
- International financial reporting, analysis, decision-making, and strategy
- US Sarbanes Oxley and the International Combined Code of Practice
- Legal Issues with Cross-border Transactions
- Client Onboarding and De-risking Strategies
- Anti-money Laundering/Countering Terrorist Fi-

- nancing and Compliance Issues for Wealth Management
- AML & Compliance for Bahamian Wealth Management Products and Services
- Ethics & Risk Management

Module V - Taxation Planning for Wealth Management

- Capital Gains versus Ordinary Income
- Foreign Source Income
- US / Domestic Source Income
- Structuring to achieve tax deferral and tax preferred planning
- Financial Privacy and Tax Transparency
 - Tax Information Exchange Agreements
 - The Foreign Account Tax Compliance Act (FATCA)
 - Global Standard of Automatic Exchange of Information
- Residence and lifestyle planning

Module VI - Private Wealth Management in The Bahamas

- Trusts, Trust Services, Underlying Companies, and Special Assets
- Foundations: Structuring, Operation, and Governance
- Private Trust Companies & Executive Entities: Unique Features and Jurisdictional Advantages
- Family Offices: Legal Set Up, Operation, Business Planning, Governance, and Risk Management
- The Bahamas ICON
- Investment Funds for Wealth Management Structures
- Private Banking Products and Services
- Real Estate Investment and Development
- Wealth Transfer and Succession Planning
- Wealth Management: Business Strategy, Performance Measurement, Manager Selection, and Benchmarking.

Module VII - Leadership and Management for Senior Executives

- Effective Teams
- Emotional Intelligence
- Effective Communication
- Conflict Resolution
- Situational Leadership