



DURATION

15 - 20 hours



DELIVERY CHANNEL

eLearning
+ Textbook



Modules:

- 1 Business Ethics and Compliance
- 2 Wealth Management
- 3 Relationship Management

eLearning

Certified Wealth Practitioner

DELIVER WORLD-CLASS CLIENT-CENTRIC WEALTH MANAGEMENT SERVICES

CERTIFICATION OVERVIEW & BENEFITS

Certified Wealth Practitioner (CWP) teaches the essential knowledge and competencies for delivering wealth management services to affluent and high-net-worth individuals and families.

This certification defines and positions wealth management services following a principles-based approach which treats the client with professional integrity, from identifying appropriate investment products to managing a diversified investment portfolio that includes measures of portfolio performance.

Business ethics underpin the core skills and competencies required to gain a deep understanding of a client's needs in order to achieve their financial goals, from the wealth accumulation phase through to the wealth transfer life stage.

Upon completion, Candidates are able to build trusted partner relationships that deliver exceptional client outcomes and create lifetime client value for your organization.

LEARNING OBJECTIVE

To achieve the highest standards of competency in client-centric wealth management services underpinned by professional integrity.

COMPETENCIES GAINED

Candidates are able to:

- Identify an appropriate ethical model for client-centric wealth management.
- Define compliance and explain the role of the compliance function in retail banks, including mitigating risks of laundering money and financing terrorism.
- Explain how business ethics encourage trust, and so improve financial performance.
- Describe the components of client relationship management (CRM) as a process and analyze the expectations of relationship customers.
- Apply a critical understanding of the role of capital markets in generating wealth over the long term.
- Identify which lending, insurance and investment products are required in the wealth accumulation phase of the client.
- Subjectively identify the client's degree of risk aversion through a suitable questionnaire.
- Recommend a diversified product portfolio that includes diversification methods, strategic asset allocation, and measures of portfolio performance.
- Compare and contrast market risk, equity risk and currency risk, and explain their paramount role in investment decisions.
- Describe the concept of WealthTech and recognize key sub-areas.
- Evaluate leading trends in Personal Financial Management (PFM).
- Analyze the financial needs of affluent Millennials.

INTENDED AUDIENCE

This certification is suitable for a wide audience, from new entrants to relationship managers who wish to progress their career into wealth management.