

Chartered Wealth Manager Qualification

The Chartered Wealth Manager Qualification is a postgraduate level specialist qualification which encompasses the breadth of knowledge needed to provide a high quality service to clients

This is a progressive qualification comprising three units:

- (1) Financial Markets
- (2) Portfolio Construction Theory
- (3) Applied Wealth Management

The CISIM (Wealth Management) is not a Master is locally accredited by the (MQC) Malta Qualifications Council at EQF Level 7.

Who should study for it?

This qualification is aimed for wealth managers, IFAs, private client managers, discretionary portfolio managers and private bankers. It is suitable for staff working in wealth management who wish to demonstrate their competence in devising investment portfolios that meet client's needs.

Entry Requirements

The Chartered Wealth Manager Qualification is a structured advanced programme of study. It is a requirement that all candidates hold an appropriate benchmark qualification prior to enrolling in the Masters. Appropriate qualification include:

- Capital Markets programme
- Investment Advice Diploma (IAD)
- Inter. Certificate in Wealth & Investment Management
- Inter. Certificate in Advanced Wealth Management
- Diploma for Financial Advisors

Study Time & Examination Settings

The recommended study time for this course is 200 hours per unit, thus a total of 600 hours. Exams are held twice a year, in June and December, and are assessed by written exam. Candidates are advised to prepare for one unit every 6 months for a completion time of 18 months.

Assessment

Each of the three units within the programme is assessed by a three-hour narrative (written) exam. The format of the exam for each of the units is as follows:

Financial Markets

Section A:

Four questions from six, worth five marks each

Section B:

Two 20-mark questions, no choice

Section C:

One 40 mark case study, no choice

Portfolio Construction Theory

Section A:

20 Multiple-choice questions, worth one mark each, no choice

Section B:

Short answer questions, worth 40 marks in total, no choice

Section C:

Two questions from three, worth 20 marks each

Applied Wealth Management

Section A:

Four questions from six, worth five marks each

Section B:

Two 20-mark questions, no choice

Section C:

One 40-mark case study, no choice