

International Certificate in Wealth and Investment Management (ICWIM)

Growing prosperity is increasing the demand for private banking services, whilst the turmoil in the financial markets demonstrates the need for robust and focused solutions to help clients withstand market volatility and preserve their wealth.

ICWIM covers the essentials of financial planning, private client asset management, fund management, advisory functions and investment analysis from a global perspective.

ICWIM is suitable for individuals engaged in private client asset management and fund accounting.

Who should take the ICWIM?

The qualification's broad focus on wealth and investment management makes it suitable for a wide audience - from new entrants to financial services to professionals already working in the industry who may be interested in diversifying into wealth management.

Key Facts

- ◇ The ICWIM exam is a two-hour, 100 MCQ paper
- ◇ The pass mark is 70%
- ◇ The syllabus is designed to provide candidates with a good grasp of: the fundamentals of financial advice, trust between advisers and customers, determining client risk profiles, the main financial markets, savings, investment, pension and protection-needs products.
- ◇ Candidates are advised to allocate approximately 154 hours to prepare for the exam.
- ◇ The exam is delivered by computer based testing .
- ◇ The fee covers the registration, the exam entry, a copy of the pdf workbook and one year student membership.

Syllabus

The Financial Services Industry.

The function of the financial services industry, macroeconomics analysis, microeconomic theory and financial markets

Industry Regulation

Financial services regulation, financial crime and corporate governance

Asset Classes

Cash, property, bonds, equities, derivatives and commodities

Collective Investment

Investment funds and other investment vehicles

Fiduciary Relationships

Fiduciary duties, advising clients and determining client needs

Investment Analysis

Calculating statistics, financial mathematics, fundamental and technical analysis, yields and ratios and valuations

Investment Planning

Investment services, investment funds, other investment vehicles including structured investment funds, edge funds, private equity, commodity funds and sukuk investments, risk and return, portfolio construction theories, investment strategies and performance management

Lifetime Financial Provision

Retirement planning, protection planning, estate planning and trusts, business tax, personal tax and overseas taxation