

# International Certificate in Advanced Wealth Management (ICAWM)

The Certificate in International Advanced Wealth Management is a higher-level qualification for experienced wealth managers and investment advisers looking to develop and consolidate their experience at a demonstrable level of professionalism, or those aspiring to become a Chartered Wealth Manager.

**This qualification is accredited at EQF Level 5.**

## Who should take the ICAWM?

The Certificate in International Advanced Wealth Management is suitable for experienced practitioners working in private banking and wealth management roles who are looking to develop and consolidate their experience at a higher-level, and/or those looking to become a Chartered Wealth Manager by achieving our Level 7 Diploma in Wealth Management.

New entrants to financial services may want to consider our Level 3 International Certificate in Wealth & Investment Management.

## How is the qualification structured?

The Certificate in International Advanced Wealth Management is achieved by passing the 2 units listed below.

**Paper 1 - Economics and Markets for Wealth Management**

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**Paper 2 - Wealth Management Practice**

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**Level 5 Certificate in International Advanced Wealth Management**

## Syllabus summary

### Paper 1 - Economics and Markets for Wealth Management

- Wealth Management and the Financial Services Sector
- Macro-Economic Environment
- Cash, Money Markets and the Foreign Exchange Market
- Fixed Income Securities
- Equities
- Real Estate and Alternative Investments
- Derivatives
- Settlement and Safe Custody

### Paper 2 - Wealth Management Practice

- Securities Analysis
- Taxation, Trusts and Foundations
- Investment Products
- Principles of Investment Risk and Return
- Portfolio Construction
- Investment Advice
- Investment Selection and Recommendation
- Portfolio Evaluation, Maintenance and Review

## Assessment Structure

Two 2-hours, 80 multiple-choice question exams delivered by computer-based testing (CBT).

### Higher level CISI qualifications

Further study opportunities include:

- ◇ Private Client Investment Advice & Management (EQF Level 6)
- ◇ Chartered Wealth Manager Qualification (EQF Level 7)

