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

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)



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ACCREDITED

TRAINING

ARTNER

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Registration Form

| CISI Fee | One time CISI Registration Fee | [♥]€65 |
|---|---|------------------|
| ICAWM | Economics & Markets for Wealth Man. Wealth Management Practice | []€510 []€510 |
| Resit Fee | Exam Re-Sit | [] € 365 |
| Personal Information | | |
| Name & Surname: | CISI Membership (if any): | |
| Date of Birth: / I.D. No.: Contact No.: | | |
| Home Address: | | |
| E-mail Address: | | |
| Office Information | | |
| Office Address: | | |
| Office E-mail: | Office Tel: | |
| I certify that the information hereby provided is true and correct: | | |
| | | |
| Signature | Date | |

Refund Policy: Full refund is offered prior to start of course, deducting a €50 administration fee. No refund applicable once the course has started.

Membership: Registration entitles you to become a full registered local member of the ifs Malta. This membership is free and valid for a maximum period of twelve months, after which the Committee will evaluate and consider whether to extend such membership for another fixed period or for an indefinite period of time. Renewal of membership is valid for an additional twelve month period. The local membership is subject to review by the Committee at any time.

Data Protection Notice: ifs Malta holds and processes your personal data in order to give you the full benefits of being a student, for administration purposes and to inform you of any future ifs Malta events, services and other related information. In instances where employers sponsor their employees for all or parts of the course/s, ifs Malta is bound to inform such employers upon the performance and results of their relevant employees if any assessment parts are carried out. ifs Malta does not sell or give your personal data to any other third party. In the eventuality that ifs Malta would need to give any personal data to a third party, you will on a case-by-case basis, be duly informed and you will also be given the opportunity to refuse that such data be given. You have the right to request access to and rectification of, the personal data concerning you that is held by ifs Malta.



