WEALTH MANAGEMENT INSTITUTE

DIPLOMA PROGRAMMES

Advanced Diploma in Asset Management

ABOUT WMI

We have come a long way

Wealth Management Institute (WMI) was established in 2003. Founded by GIC and Temasek, we are the leading training provider for wealth and asset management in Asia.

We build capabilities for investing in a better tomorrow

Our programmes serve wealth managers, asset managers, investment advisors, lawyers, trust professionals, wealth planners, high net-worth families and financial regulators across Asia.

We deliver innovative learning and research that connect the best of theory and practice, based on the work of the world's best thought leaders in finance.

Through our work, we will build a community of learners and leaders, through excellence in practice-led education.

OUR VISION

To be Asia's Centre of Excellence for wealth and asset management education and research

OUR MISSION

To build capabilities for investing in a better tomorrow

OUR APPROACH

We are a practice-based education and research institute, connecting rigorous academic theory with current industry best practices to ensure we provide global perspectives with an Asian focus.

World Class Curriculum

Best-in-breed course content and pedagogy, rigorous methodology, striving for excellence

Advanced Expert Skills

Connecting theory with practice, case-based, learning, industry exposure and immersion, connecting people with opportunities

Forward Looking Insights And Thinking

Proprietary research, partnering with industry pioneers and thought leaders, innovating new approaches

Sense of Purpose

Discovering personal/ professional purpose, values-based learning, ethics/governance mindset, sustainable outcomes

ADVANCED DIPLOMA IN ASSET MANAGEMENT

The Advanced Diploma in Asset Management (ADAM) is a structured and comprehensive training programme which equips new entrants and existing professionals with skills and topics relevant to the asset management, private equity and venture capital sectors. Taken together, the 9 modules provide a strong foundation for new / emerging talent and cross-sector convertees, as well as upskilling of existing talent in these sectors and are intended to lead to an Advanced Diploma certificate. Designed to align with industry standards, the ADAM is built on 4 key pillars:

1. Foundation Skills e.g. financial markets fundamentals, asset allocation;
2. Critical Applied Skills e.g. critical thinking, presentation skills;
3. Technical Skills e.g. programming for finance, alternative asset classes; and
4. Investment Management for Tomorrow e.g. Data Tools and Platforms, ESG

Who should apply?

- Fresh graduates or young professionals with less than 3 years' experience in asset management, private equity wealth management or venture capital sectors
- Existing professionals in the asset management, private equity and venture capital sectors
- Cross-sector convertees or mid-career professionals taking on a new or enhanced role in asset management, private equity or venture capital sectors
- Minimum Education : Bachelors' Degree or equivalent
- TOEFL score: > 100 or IBT ELTS score: > 6.5, if English was not the medium of instruction used at the undergraduate level

Accreditation & Certification

All modules have been individually accredited to IBF-Standards Training Scheme and are eligible for IBF funding and CPD hours.

WMI Certification & Advanced Diploma

Participants who successfully complete the programme will be awarded WMI Certificate of Achievement. Upon meeting all Graduation Criteria, participants will be awarded "Advanced Diploma in Asset Management" issued by Wealth Management Institute International Pte Ltd.

IBF Certification

IBF Certification is an industry endorsed mark of quality for finance professionals in Singapore. The IBF Certification is awarded to practitioners who have attained the required skills for the selected industry segment and function, and are expected to uphold values of professional excellence, integrity and commitment to the industry.

Please visit https://www.ibf.org.sg/certification/Pages/Why-be-Certified.aspx for more information on the IBF Certification.

Curriculum & Modules

The programme is designed to be modular and work-friendly. Classes are conducted about 2-5 days per month, allowing participants to harness the best of learning from both classroom and on-the-job immersion. Each module is individually accredited under IBF-STS.

Two modes of study: Standalone and/or Stackable

Each module covers different topics and subject matters. They can be taken individually or together, to cater to the varying focus and interests of each firm, talent and professional. Participants who pass all nine modules will be awarded the Advanced Diploma in Asset Management certification.

No	Module	Online Hours	Classroom Hours	CPD Hours
1	**The World of Asset Management – An Overview** This course provides a good overview of the Asset and Wealth Management industry and the various sub-sectors within. Participants will learn about the fundamentals of financial markets and understand how to make sense of the world around us, including implications of geopolitical events. Participants will also be introduced to key asset classes, and thereafter, be introduced to basic principles of Asset Allocation. They will also learn about common investment styles and strategies employed by various asset managers. Finally, participants will also be introduced to concepts around different behavioural biases and how these influence and affect investing decisions, portfolio management and market behaviour.	-	**26**	-
2	**Compliance, Ethics and Moral Dilemmas** Having a clear understanding of the compliance rules and regulations governing asset management is critical for operating in the industry. However, just knowing the rules is not enough. This course also teaches participants that ethical conduct goes beyond what is required by law. It forms the backbone of an enduring and trusting relationship with clients and investors, and also provides a good compass in situations of ethical and moral dilemmas.	-	**13**	- **Core FAA/SFA - 13**
3	**Data Tools and Platforms** This course will provide an overview of the various sources of investment data and how asset managers use such data. Participants will gain an understanding of how to organize such data and how to read/analyse them, how data becomes useful information.	-	**13**	-
4	**Alternatives Primer** Alternative investments are typically used as a means of diversification within an investment portfolio and have grown in popularity over time. Investors are increasingly looking upon alternative investments as a source of market outperformance. This course aims to provide a good overview of the different types of alternative investments, their risk-reward profiles and also discusses some of the common misperceptions of this space.	-	**19.5**	-

Curriculum & Modules

No	Module	Online Hours	Classroom Hours	CPD Hours
5	**Building Blocks for Asset Management – Public Markets** This course provides an introduction to the basic technical building blocks in asset management, starting with an overview of the various investment fund vehicles. Participants will also be taught what are the key indicators of fund performance, how a fund is priced and learn how to read a fund factsheet. An overview of key functions supporting an asset management organisation will also be taught, such as the fund settlement process. Participants will also learn about fund legal structures in various countries, and fund passporting.	-	13	- **Core FAA/SFA - 2.5**
6	**Building Blocks for Private Markets** This course provides a good overview of the basic technical and commercial building blocks required when assessing and executing a private markets investment opportunity. For each alternative assets class type, participants will learn how to build an investment case, diligence a target company including what to look for in financial statements beyond just the numbers, and work through a standard investment process towards completion. Participants will gain an understanding of function and mechanics of key terms in a typical transaction. The course will provide an overview of post-investment related priorities, workstreams and risks, and finish with giving insight on key realization routes and strategies.	-	13	-
7	**Client and Investor Management Toolkit** This course aims to teach participants the importance of Strategic Vision & Critical Thinking in the Digital Age. Participants will also learn key communication skills and be taught how to make effective pitches to clients.	-	13	-
8	**Investment Technology in Action** This course first provides an overview of technologies disrupting (or enabling) the asset management industry. Participants will also learn about the various possible applications of Artificial Intelligence and Machine Learning in Investing and gain an understanding of Robo Advisory and its value proposition as well as constraints.	-	13	-
9	**Introduction to ESG & Sustainable Investing** This course provides a good overview of ESG & Sustainable Investing. Participants will learn the fundamentals of Environmental, Social and Governance "ESG" considerations and why its increasingly important when assessing investments but also the importance of post investment monitoring and application of higher standards. Participants will learn the important role LPs such as SWF, PFs and Endowments play in advocating ESG standards, where we are, how differently ESG standards is viewed across the world stage, and what still needs to be done to really achieve Sustainable Investing. Participants will also be taught the basics of Sustainable Investing and understand best practice, illustrated with case studies.	-	13	-

WEALTH MANAGEMENT INSTITUTE

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The Institute of Banking & Finance Singapore

This programme has been accredited by The Institute of Banking and Finance Singapore (IBF).
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