

Advanced Diploma in Wealth Management

Perfect Balance of
Academia and Practice

Up to 70% IBF Funding
for Singaporeans and
Permanent Residents

Accredited under IBF-STs



Eligible for
Core FAA/
SFA Hours

Leadership Level:
New-to-industry and
Cross-sector convertees

Enquiries? Send an email to:
contact@wmi.edu.sg

The Advanced Diploma in Wealth Management (ADWM) is designed for individuals to re-think, re-tool and re-skill themselves to manage wealth for affluent and high-net-worth clients.

Each module is individually crafted to impart knowledge capital, applied skills and trends covering the full spectrum of wealth management. Take modules individually or complete all within 6 months to get an Advanced Diploma in Wealth Management to suit your learning needs.

Register for selected modules depending on your needs, interests, and specialisation. Earn a WMI Certificate of Achievement for each module completed.

Complete seven modules and earn an Advanced Diploma in Wealth Management issued by Wealth Management Institute International Pte Ltd.

Who should attend

Professionals with a minimum diploma qualification, and three years of relevant working experience. Past participants include:

- Client advisors from private and priority banking
- Financial and insurance advisors
- Asset and trust managers
- Professionals from non-financial industries such as lawyers, accountants, doctors and business-owners

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or scan for more information



Advanced Diploma in Wealth Management: Modules



Ethics, Regulatory Compliance & Client Onboarding (8 online hours)

This module promotes ethical conduct in the workplace. It focuses on commonly faced ethical dilemmas in the wealth management industry. Partnering with Dr Mary Gentile from Darden University, a key component of this module is the innovative “Giving Voice to Values” (GVV) approach to values-driven development.

The GVV curriculum will offer skills and tools for handling these dilemmas in the workplace in an authentic and results-oriented way. This module will also cover regulations critical to the wealth management industry.



Investment Advisory (4 online hours, 15.5 classroom hours)

This module aims to enhance the quality of investment recommendations from product to portfolio and from sell to advisory.

The client's risk profile, investment objectives, behavioural bias and product suitability are not static. Monitoring them for changes will lead to effective portfolio optimisation, and rebalancing through asset allocation models such as strategic and tactical, core and satellite, top-down thematic approach, bottom-up securities selection approach and investment versus economic cycle.



Investment Product Strategies (5 online hours, 14.5 classroom hours)

Knowing the risks and benefits each investment product brings is key to arriving at suitable recommendations.

Strategies include investment product rotation, sector rotation, style and factor investing for equities, fixed income, mutual funds, exchange-traded funds, alternatives and structured products. Case studies and discussions will further demonstrate how these strategies can be applied and deployed over investment cycles in diverse situations.



Data Science and Fintech I (6 online hours, 13.5 classroom hours)

Future-proof yourself amidst the evolution of financial services and wealth management in the global financial market, the various types of fintech and how institutions and regulators are adjusting to digitisation. Artificial Intelligence, Blockchain and Cryptocurrencies bring both benefits and threats. They are best managed through an understanding of digital hygiene and integrity, cybersecurity, data analytics, and digital risk management in the new workspace.



Advanced Wealth Planning, Family Office and Business Succession

(5 online hours, 14.5 classroom hours)

This module will provide you valuable insights into wealth planning's approach and effectiveness in helping clients and families attain long-term objectives, such as wealth preservation, inter-generational wealth transfer and succession planning.

Learn about the tools to uncover a client's succession, philanthropic and financial needs, international tax concepts, family business governance and inter-generational wealth transfer challenges.



Client Relationship Management (4 online hours, 15.5 classroom hours)

Understand what constitutes a successful client management strategy and apply this in acquiring new relationships and deepening existing ones. A framework for establishing rapport and enhancing trust, effective negotiation techniques and strategies to expand connections will be covered.

Learn about the benefits of adopting a “business owner” approach in segmenting and building your client book through internal and external sources. Role plays and class discussions will enable you to practice what has been learned.



Cross Banking (19.5 classroom hours)

Having a good understanding of common cross banking needs and how to engage specialists to develop suitable solutions is paramount to deepening client relationships.

This module goes through the common cross banking needs of high-net-worth clients and provides a framework for identifying these needs, developing solutions for them and managing their associated risks. It focuses on using credit and levers in designing solutions for HNW clients.

Accreditation, Certification & Fee Breakdown

This programme is accredited under the Skills Framework for Financial Services and are eligible for funding under the IBF Standards Training Scheme. Singaporean Citizens and Permanent Residents are eligible for up to 70% course fee funding.

This programme provides the technical skills and competencies relevant for an IBF Certification in Asset Management (Product Solutioning and Management).

In addition to Course Fees, each participant will also be charged a non-refundable and non-claimable application fee of S\$85 (including GST).

SkillsFuture Credit can be utilised to offset the balance of the programme fees after IBF subsidy. It is not available for the Additional SFC (Mid-Career Support). Do note that SkillsFuture Credit cannot be used to offset Application Fees.

NTUC members enjoy 50% unfunded course fee support for up to \$250 each year when you sign up for courses supported under Union Training Assistance Programme (UTAP). NTUC members aged 40 and above will get increased funding support from \$250 to \$500.

Modules	Full Fees (inclusive of 9% GST)	Fees after IBF subsidy (inclusive of 9% GST)	
		Singaporeans Aged Below 40/ Permanent Residents (50% IBF-STC Funding)	Singaporeans Aged Above 40 (70% IBF-STC Funding)
Ethics, Regulatory Compliance & Client Onboarding	\$654	\$354	\$234
Investment Advisory	S\$3,651.50	S\$1,976.50	S\$1,306.50
Investment Products Strategies	S\$3,651.50	S\$1,976.50	S\$1,306.50
Data Science and Fintech I	S\$3,651.50	S\$1,976.50	S\$1,306.50
Advanced Wealth Planning, Family Office and Business Succession	S\$3,651.50	S\$1,976.50	S\$1,306.50
Client Relationship Management	S\$3,978.50	S\$2,153.50	S\$1,423.50
Cross Banking	S\$3,978.50	S\$2,153.50	S\$1,423.50
<u>TOTAL</u>	<u>S\$23,217</u>	<u>S\$12,567</u>	<u>S\$8,307</u>