

Certificate for Family Office Advisors for Greater China Markets

Delivered in
Mandarin

Up to 70% IBF Funding
for Singaporeans and
Permanent Residents

Eligible for 19
IBF-STs CPD Hours



Next Intake: March 2025

Wealth Management Institute
One Marina Boulevard, #16-01

Contact us: programmes@wmi.edu.sg

This programme intends to teach skills specific to the Greater China Market context. Covering East-West learnings, the programme provides insights into the dynamics and psychology of wealthy Chinese families and their approach to wealth and succession planning. Participants will also be given an overview of common family office structures, challenges faced by families who are multi-located and how they operate. This programme will be particularly useful for advisors handling the Chinese markets.

Designed specially for professionals serving the Ultra High Net Worth (UHNW) segment within the Greater China Market, the programme will be delivered in Chinese and comprises six different modules covering East-West learnings. Participants will be given an overview of common family office structures, challenges faced by families who are multi-located and how they operate.

This programme is specifically designed for individuals with more than three years of relevant experience who have demonstrated applied knowledge in the various functions within the Family Office segment.

Who should attend

- Multi and Single Family Office Representatives
- Wealth Planning Professionals
- Private Bankers and Client Relationship Managers handling UHNW and Family Office Segment
- Family Trust Consultants
- Private Client Practice Professionals including lawyers and accountants
- External Asset Management Professionals
- Financial Planners

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Accreditation & Fee Breakdown

This programme is pending accreditation by The Institute of Banking and Finance (IBF) under the IBF Standards Training Scheme (STS).

Singaporeans and Permanent Residents are eligible for enhanced funding support under the revised IBF Funding quantum from 1 January 2023.

Full Fees		Fees after IBF subsidy (inclusive of 9% GST)	
Before GST	After GST	Singaporeans Aged Below 40/ Permanent Residents (50% IBF-STC Funding) Company & Self-Sponsored	Singaporeans Aged Above 40 (70% IBF-STC Funding) Company & Self-Sponsored
<u>S\$6,000</u>	<u>S\$6,540</u>	<u>S\$3,540</u>	<u>S\$2,340</u>