WEALTH MANAGEMENT INSTITUTE

Certified Family Office Practitioner

Tailored for Aspiring Professionals in the Family Office Sector	Up to 70% IBF Funding for Singaporeans and Permanent Residents	Complimentary One-Year Membership to Global-Asia Family Office Circle Upon Completion of All Modules

Programme Overview

The “Certified Family Office Practitioner” is WMI’s signature programme designed to equip aspiring practitioners with the necessary skill set to navigate the intricate landscape of the Family Office. This programme aims to provide a foundational comprehension of the perspective essential to family offices, internal dynamics and structural setup, allowing participants to progress as well-rounded practitioners into the family office sector.

The programme has been structured to cover a range of essential topics that form the core of a successful Family Office practitioner’s skill set. This stackable approach allows participants to complete the programme at their own pace, giving them the flexibility to balance their learning with their other professional commitments.

The participant will be offered a complimentary one-year membership to the Global-Asia Family Office Circle upon completion of all modules.

Who should attend

- Aspiring Multi and Single Family Office Professionals
- Wealth Planner and Estate Planner
- Professionals from the Trust Industry
- Private Client Practice Professionals including lawyers, accountants and tax specialist
- Family Office Advisor
- Client Advisor
- Client Relationship Managers handling UHNW and Family Office segment
- External/ Independent Asset Manager
- Investment Analyst and Counsellor

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or scan to enquire

Contact us at
programmes@wmi.edu.sg

Programme Structure

This programme suite is designed to be taken on a modular basis based on each learner's individual needs and experience.

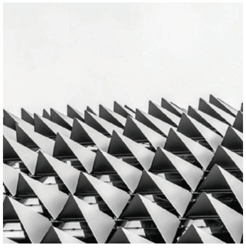
Certificate for Family Office Practitioner - Managing Family Dynamics
(Eligible for IBF-STS: 8 CPD hours)
This course provides a good overview of the Family Office landscape in Singapore and around the world.

Participants will learn about the Family Office ecosystem as well as the various structures used across generations through history, and the reason behind the structures.

Participants will also understand how the family offices are governed in varying complexity and learn how to manage family dynamics such as family conflicts and priorities.

Certificate for Family Office Practitioner – Legacy and Impact for the Family
(Eligible for IBF-STS: 8 CPD hours)
Families are increasingly becoming more involved in creating their legacy through philanthropic giving and the impact they have.

This course provides a good introduction to how families of wealth approach philanthropy and impact investing. Participants will first learn about broad global trends, themes and concepts in relation to philanthropy and how to help the family identify their giving objectives. They will also learn about how some families are increasingly aligning their giving to sustainability themes and understand how ESG factors matter in not just giving but also the investment activities and decisions of the family.



Certificate for Family Office Practitioner – Family Office Investments
(Eligible for IBF-STS: 8 CPD hours)
Through this course, participants will understand the fiduciary duty of the family office executive in managing assets across generations.

Participants will examine the needs of the family in deciding investment principles with an emphasis on the longevity and preservation of capital across generations.

Certificate for Family Office Practitioner – Family Office Management and Operations
(Eligible for IBF-STS: 8 CPD hours | SFA/FAA: 3 hours)
This course provides an overview of the key considerations surrounding the family office set-up, infrastructure and operations.

Participants will also learn about key risk considerations such as cybersecurity, family/principal reputation, operating risks (including manpower), etc and also understand the regulatory and financial reporting obligations of the family office. Participants will also learn how to identify stakeholders and how to engage and manage them.

Certificate for Family Office Practitioner – Succession and Wealth Transfer
(Eligible for IBF-STS: 8 CPD hours)
This course introduces the concepts around succession and the transfer of wealth from generation to generation and provides an overview of common approaches and practices around the world.

Participants will learn about the various wealth planning tools and solutions typically relevant to the ultra-high net worth segment and gain and understanding of how each of these may be used effectively. Participants will also learn about common challenges faced by families, especially where they are multi-jurisdictional and multi-generational and what these families need to consider when thinking about succession. Participants will also learn to identify best practices of managing private family wealth, risks associated with succession planning, and approaches in initiating wealth transfer discussions with the Family.

Additional modules will be launched progressively and required for certification by WMI.

Accreditation & Fee Breakdown

Fees shown are after IBF-STS funding. Subsidised# fees apply to eligible participants and are contingent upon successful completion of the programme, which includes (i) fulfilling minimum attendance requirements and (ii) passing all relevant assessments.

The information above is correct at the time of publication. Wealth Management Institute reserves the right to amend the fees and/or terms and conditions as appropriate.

	Full Fees		Fees after IBF subsidy (inclusive of 9% GST)	
	Before GST	After GST	**Singaporeans Aged Below 40/ Permanent Residents** (50% IBF-STS Funding) Company & Self-Sponsored	**Singaporeans Aged Above 40** (70% IBF-STS Funding) Company & Self-Sponsored
Certificate for Family Office Practitioner - Managing Family Dynamics	S$2,000	S$2,180	S$1,180	S$780
Certificate for Family Office Practitioner – Legacy and Impact for the Family	S$2,000	S$2,180	S$1,180	S$780
Certificate for Family Office Practitioner – Family Office Investments	S$2,000	S$2,180	S$1,180	S$780
Certificate for Family Office Practitioner – Family Office Management and Operations	S$2,500	S$2,725	S$1,475	S$975
Certificate for Family Office Practitioner – Succession and Wealth Transfer	S$2,000	S$2,180	S$1,180	S$780

Subsidies are subject to change by IBF and fees will be adjusted based on prevailing funding rates.