FAMILY OFFICE

Certificate for Family Office Advisors – Foundation

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

CERTIFICATE FOR FAMILY OFFICE ADVISORS – FOUNDATION

Drawing on real-world case studies, the foundation level facilitates the overall understanding of the types of family offices, their different functions, the legal and fiscal context in which they operate, as well as means and tools that can help protect wealth for the long term. A significant part of the learning will seek to understand the human context of wealth owners: individuals, entrepreneurs and families. **This is the first of a two-part course and is required prior to taking the Certificate for Family Office Advisors-Advanced programme.**

Who should apply?

Individuals with more than 3 years of relevant experience and with demonstrated applied knowledge in the various functions within the family office segment

- 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

Accreditation & Certification

WMI Certification

Participants who successfully complete the programme will be awarded the WMI Certificate of Achievement.

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.

Participants who meet the experience requirement as mandated by IBF will be eligible for Certification in Family Office Advisor – Private Banking . Terms and conditions apply.

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

SILE

- Eligible CPD Points: 3
- Practice Area: Private Client
- Training Level: Foundation
- Participants who wish to obtain CPD Points are reminded that they must comply strictly with the Attendance Policy set out in the CPD Guidelines. For this activity, this includes signing in on arrival and signing out at the conclusion of the activity in the manner required by the organiser, and not being absent from the entire activity for more than 15 minutes. Participants who do not comply with the Attendance Policy on any particular day of the activity will not be able to obtain CPD Points for that day of the activity. Please refer to http://www.sileCPDcentre.sg for more information.

Curriculum & Modules

The programme is tailored to industry practitioners who wish to have practical and in-depth understanding of family offices, globally and in the context of the Asian family landscape. Participants will emerge with core knowledge, capabilities, tools and insights to support their clients in managing and elevating multi or single family offices operations.

Total: 20 CPD hours
FAA CPD: 5 hours
SFA CPD: 5 hours

No	Module
1	**Mapping the Family Office World**
2	**The Singapore Landscape**
3	**Looking through the Lens of the Family**
4	**Structuring the Family Office**
5	**Preparing the Next Generation**
6	**Planning for the Long Term**

WEALTH MANAGEMENT INSTITUTE

FAMILY OFFICE

Certificate for Family Office Advisors – Advanced

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Forward Looking Insights And Thinking

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Sense of Purpose

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CERTIFICATE FOR FAMILY OFFICE ADVISORS – ADVANCED

Taking participants beyond the basics of Family Offices, the advanced level delves deeper by first shedding light on the heart of today's UHNW families. The programme explores the psychology and motivations of today's affluent dynasties, uncovering an array of opportunities available, including the fast-emerging area of impact investing. Understand the mindset of clients who wish to reflect their values for society and the environment in their wealth decisions.

This is the second part of a two-part course. Completion of the Foundation programme is required before taking the Certificate for Family Office Advisors – Advanced programme.

Who should apply?

Individuals with more than 3 years of relevant experience and with demonstrated applied knowledge in the various functions within the Family Office segment.

- 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
- Participants who have completed the foundation programme

Accreditation & Certification

WMI Certification

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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.

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

SILE

- Eligible CPD Points: 3
- Practice Area: Private Client
- Training Level: Intermediate
- Participants who wish to obtain CPD Points are reminded that they must comply strictly with the Attendance Policy set out in the CPD Guidelines. For this activity, this includes signing in on arrival and signing out at the conclusion of the activity in the manner required by the organiser, and not being absent from the entire activity for more than 15 minutes. Participants who do not comply with the Attendance Policy on any particular day of the activity will not be able to obtain CPD Points for that day of the activity. Please refer to http://www.sileCPDcentre.sg for more information.

Curriculum & Modules

Participants will gain a comprehensive and actionable framework with tools that can be put into practice in analysing their client's operating context, and recommending sustainable and responsible strategies to meet their financial and philanthropic ambitions.

Total: 23.5 CPD hours

No	Module
1	**A Deeper Look at Family Offices**
2	**Wealth, Family and Psychology**
3	**Responsible Wealth**
4	**Caring Wealth**
5	**Investing for the Family – Portfolio Management**
6	**A Deeper Look at Direct Private Equity Investments**
7	**Managing Risk for the Family**