

Eligible for 39
IBF-STC CPD hours

Signature programme for
WMI's Asia Centre for Changemakers

Up to 70% IBF Funding
for Singaporeans and
Permanent Residents

Certified Impact Philanthropy Professional Programme

Next Intake:
27 - 31 May 2024
9am - 6pm

Wealth Management Institute
One Marina Boulevard, #16-01,
Singapore 018989

Contact us at rsvp@wmi.edu.sg

The Certified Impact Philanthropy Professional is the WMI Asia Centre for Changemakers' signature programme. It is designed to provide family office professionals, wealth advisors and planners with the knowledge and skills to support high net worth individuals and families with their social change endeavours.

Through a series of practitioner-led teachings and hands-on discussions, participants will graduate with the ability to confidently strategise, advise, and implement philanthropic plans for families and clients to drive transformational change.

The programme has been structured into 2 parts.

- Certificate in Philanthropy and Social Impact
- Advanced Certification in Philanthropy and Social Impact

Completion of the Certificate in Philanthropy and Social Impact is required prior to taking the Advanced Certificate in Philanthropy and Social Impact.

To be a Certified Impact Philanthropy Professional, participants must complete the two mandatory programmes.

All participants to the programme will be given complimentary membership to the GFO Circle for a year.

Who should attend

- Multi and Single Family Office Representatives
- Family Foundation Representatives
- Wealth and Estate Planning Professionals
- Private Bankers and Client Relationship Managers handling UHNW and Family Office segment
- Family Trust Advisors and Consultants
- Private Client Practice Professionals including lawyers, tax professionals and accountants
- Non-Profit Organisations and Charities Professionals

Enquire Now

or scan to enquire



Programmes Offered



Certificate in Philanthropy and Social Impact

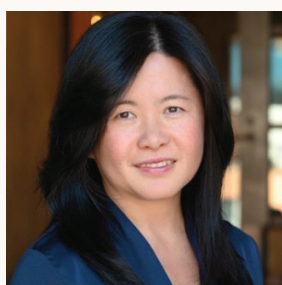
The Certificate in Philanthropy and Social Impact will help wealth advisors, wealth planners and family office professionals formulate philanthropic and social impact frameworks and strategies for Family Offices and clients. Learn from leading global and local experts to integrate Philanthropy into your advisory practice and build deeper, more meaningful connections with Family Principals and clients.



Advanced Certificate in Philanthropy and Social Impact

The Advanced Certificate in Philanthropy and Social takes a deep-dive into the philanthropic advisory practice across Asia. Analyse global and regional philanthropic trends and learn about the giving behaviours of high-net-worth families and giving opportunities across various capital allocation types.

Meet Your Faculty



Dien Yuen

Lead Faculty for Philanthropy, WMI Co-Founder & CEO, Daylight Advisors; Experienced wealth advisor and former Chief Philanthropy Officer, Give2Asia

Dien co-founded Daylight Advisors to revolutionize the field and practice of philanthropic advising.

She founded the Center for Philanthropy and Social Impact at The American College of Financial Services, where she also developed and taught courses as the Blunt-Nickel Professor in Philanthropy for the Chartered Advisor in Philanthropy® (CAP®) designation. While at the College, Dien launched the Advisors of Color CAP® Study Group, a support group for BIPOC advisors pursuing their designations. That initiative tripled the number of CAP-trained BIPOC philanthropic professionals in the field in less than three years. In addition, she developed and launched Purpose School, an immersive, interactive learning experience to help leaders explore the intersections of purpose and social impact in their lives.

Earlier in her career, Dien worked for several wealth management firms and held executive positions in regional and global development organizations. Her former positions include Chief Philanthropy Officer at Give2Asia, Vice President and Senior Trust Officer at U.S. Trust, Executive Director of the IIT Bombay Heritage Fund, Vice President of the Asian Pacific Fund, and Planned Giving Director of the American Cancer Society.

Accreditation & Fee Breakdown

The programme is accredited 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. The fees listed are after IBF-STs funding. Any discrepancies in registration details or failure to meet minimum IBF academic requirements will result in an unsuccessful IBF reimbursement claim and students will be liable for the full tuition fees.

SkillsFuture Credits can be utilised to offset the balance of the programme fees after IBF subsidy. Global-Asia Family Office Circle (GFO Circle) Members are entitled to 10% discount across "Family Office" programmes. 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 up to S\$3,000 each) Company & Self-Sponsored
Certificate in Philanthropy and Social Impact	S\$3,400	S\$3,706	S\$2,006	S\$1,326
Advanced Certificate in Philanthropy and Social Impact	S\$5,100	S\$5,559	S\$3,009	S\$2,559
<u>TOTAL</u>	<u>S\$8,500</u>	<u>S\$9,265</u>	<u>S\$5,015</u>	<u>S\$3,885</u>