



Advanced Diploma in Investment and Wealth Management

Faculty List

The faculty comprises leading / senior financial services professionals from local and international financial markets, with a good representation of IBF Fellows and IBF Distinguished Fellows. The majority of the faculty have regional supervisory experience in leading financial institutions.

| Core Modules | Faculty | Qualifications | Designation | PT/FT |
|--|------------------------|--|---|-------|
| Dalio Market Principles Online | Dr. Anser Aftab Kaz | PhD in Politics and International Relations, University of Cambridge, UK | Principal Program Director, Dalio Market Principles, WMI | PT |
| Compliance Risk and Compliance Culture | Ms Sharon Craggs | Master of Science Digital Innovation and Financial Technology | Principal Programme Director, Compliance, Governance & Risk Management, WMI | FT |
| | Ms Lim Siew Lee | Bachelor of Accountancy, NUS | Head of Compliance, Hong Leong Finance | PT |
| | Mr Yeo Tung Kheng, Jon | Bachelors of Social Science, NUS | Former Chief Compliance Officer, Maybank SG | |
| Introduction to ESG Advisory | Mr Mervyn Tang | MSc Economics | Head of Sustainability APAC, Schroders | PT |
| | Mr Martin Faessler | Executive Master in HR Management | Former Sustainability Manager, Bank Julius Baer | |
| | Mr Neil Mascarenhas | MBA, Capital Markets | Lead Sustainable Investing, FWD Group | |
| | Mr Ravi Chidambaram | Masters in Business Administration | Founder and President of TC Capital | |
| | Mr Sadiq Currimbhoy | PhD in Economics | Vulpes Investment Management, Consultant | |



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|--|------------------------|------------------------------------|--|--|
| | Ms Eugenia Koh | Bachelor in Mass Communications | Global Head, Sustainable Finance, SCB | |
| | Ms Priyaka Dhingra | Masters in Business Administration | Senior Specialist, Investment Stewardship, UNPRI | |
| | Ms Eleonore Dachicourt | Global Executive MBA | Head of Sustainability, Wealth Management, BNPP | |
| | Mr James Cheo | Bachelors in Finance | Chief Investment Officer, HSBC Private Bank | |
| | Mr Sujay Shah | Masters in Business Administration | Former Global Head, Clean Tech Coverage, SCB | |



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|---|--------------------------|---|--|-------|
| Certificate in Multi-Asset Investing | Dr. Aaron Low | PhD In Financial Economics, Anderson School UCLA | CEO, Lumiq | PT |
| | Prof. Claudia Zeisberger | Bachelor's Degree in Finance & Marketing & International Trade, AKAD University, Rendsburg, Germany | Professor at INSEAD | PT |
| Certified Private Banker Level 1 - Wealth and Legacy Planning | Mr. Peter Triggs | Honors degree in Mathematics and Philosophy, University of Birmingham | Partner, 1291 Group | PT |
| | Mr. Ethan Chue | Chartered Accountant, CA (Singapore) Bachelor of Accountancy, Nanyang Technological University | CEO, Family Succession Advisors | PT |
| | Mr Raymond Gwee | Master of Laws | Director, K K Lee Law Corporation | |
| | Mr Lee Woon Shiu | Bachelor of Laws | Regional Head of Wealth Planning Family Office & Insurance Solutions | |
| | Mr Mike Tan | Bachelor of Laws | Global Head of Wealth Planning and Family Advisory, SCB | |
| | Ms Chan Mary | Bachelor in Banking and Wealth Management | CEO, EFG Wealth Solutions | |



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|---|-------------------|--|--|----|
| | Ms Lili Chiam | Bachelor of Accountancy | Wealth Planner Principal, Citi Private Bank | |
| Certificate in Introduction to Alternatives Investing | Mr. Manali Parekh | Bachelor of Business Administration, Goizueta Business School at Emory University. | Managing Director, Blackstone Private Wealth | PT |
| | Ms Chen Liangzi | Double Major in Psychology and Strategic Management, Bachelor of Social Science | Vice President, Blackstone Private Wealth | |

| Elective Modules | Faculty | Qualifications | Conferring Institute | PT/FT |
|---|----------------------------|--|---|-------|
| Certificate in Philanthropy and Social Impact | MS. Natalie Kennedy | BSE Chemical Engineering | Co-founders, Real Impact Advisors | PT |
| | MS. Stacey Choe | Masters in Social Anthropology of Development | | |
| Certified Private Banker Level 1 - Client Management Skills | Mr. David Ong | Masters in business administration, University of Washington (Seattle, WA) | WMI Consultant | PT |
| | Mr. Eddie Gan | MBA in Accounting, University of British Columbia, Canada | WMI Consultant | |
| | Mr Hendrik Robert De Glint | Master in Economics (Business Administration) | WMI Consultant | |
| | Mr Garth Bregman | EMBA, INSEAD | Head of Wealth Management SG & SEA, BNPP | |
| | Mr Krist Wong | Bachelor in Business Management | Managing Director, Group Head, Julius Baer | |
| | Mr Marcus Teo | Masters of Science in Finance, City University of New York | Managing Director, Treasures Private Client | |



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|--|-----------------------------|---|--|-------|
| <ul style="list-style-type: none">• Certificate for Family Office Practitioner – Family Office Investments• Certificate for Family Office Practitioner - Managing Family Dynamics | Mr. Leonardo Drago | Masters in Business Administration | Edinburgh Business School Heriot-Watt University | PT |
| | Mr. Martin Roll | Masters in Business Administration | INSEAD | |
| | Prof Denise Kenyon-Rouvinez | PhD in Management from HEC Lausanne in collaboration with IMD | Principal Programme Director, Family Office, WMI | |
| <ul style="list-style-type: none">• Certificate in Digital Assets Investment Strategies and Risks• Digital Assets - Regulatory & Compliance | Mr. Dimitri Vardakas | Master of Science in Engineering Master Degree in Physics | School of Chemistry, Physics and Electronics of Lyon University of Nice | PT |
| | Mr. Jason Toussaint | Master of Business Administration – Finance | University of Chicago Booth School of Business | PT |
| | Mr. Nizam Ismail | Bachelor of Laws | National University of Singapore | PT |
| <ul style="list-style-type: none">• AI Applications in Asset Management• AI Applications in Wealth Management | Dr. Aaron Low | PhD In Financial Economics, Anderson School UCLA | CEO, Lumiq | PT |
| | Dr. Maxim Afanasyev | PhD in Operations, Information and Technology, Stanford Graduate School of Business | Global Strategic Industries Team, Financial Services Industry in JAPAC, Google Cloud | PT |