

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