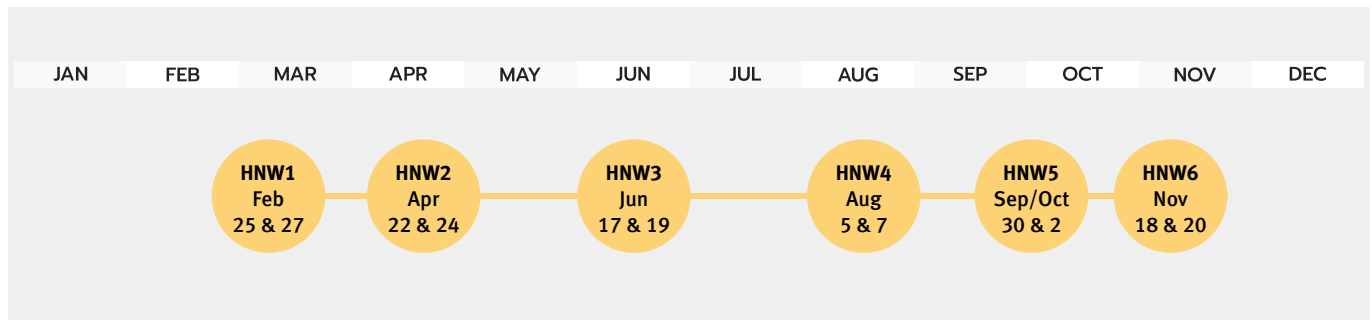


High Net Worth Certification Programme

Cohort 1, 2025 – Key Study Dates and Training Times



*Workshop attendance dates shown above, is the duration of a nominated cohort journey in sequential subject order for completion in less than 12 months.

Subject 1: Private Wealth and Family Office: Environment, Trends and Client Focus

February 2025	
Online access to subject material	Monday, 17 February
Face to Face Workshop 1	Tuesday, 25 February @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 27 February @ 1:00pm – 5:30pm
Assignment due	Thursday, 6 March

Subject 2: Business Structuring and Tax Considerations (including Beyond Borders Advice)

April 2025	
Online access to subject material	Monday, 14 April
Face to Face Workshop 1	Tuesday, 22 April @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 24 April @ 1:00pm – 5:30pm
Assignment due	Thursday, 1 May

High Net Worth Certification Programme

Subject 3: Estate Planning Strategies for High Net Worth Individuals and Family Offices

June 2025	
Online access to subject material	Monday, 9 June
Face to Face Workshop 1	Tuesday, 17 June @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 19 June @ 1:00pm – 5:30pm
Assignment due	Thursday, 26 June

Subject 4: Insurance Solutions and Asset Protection for High Net Worth Individuals

August 2025	
Online access to subject material	Monday, 28 July
Face to Face Workshop 1	Tuesday, 5 August @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 7 August @ 1:00pm – 5:30pm
Assignment due	Thursday, 14 August

Subject 5: Private Wealth Investment Strategies and Portfolio Construction

September 2025	
Online access to subject material	Monday, 22 September
Face to Face Workshop 1	Tuesday, 30 September @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 2 October @ 1:00pm – 5:30pm
Exam	Tuesday, 14 October

High Net Worth Certification Programme

Subject 6: Applied Business Strategy for HNWIs and Family Offices

November 2025	
Online access to subject material	Monday, 10 November
Face to Face Workshop 1	Tuesday, 18 November 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 20 November @ 1:00pm – 5:30pm
Assignment due	Wednesday, 26 November