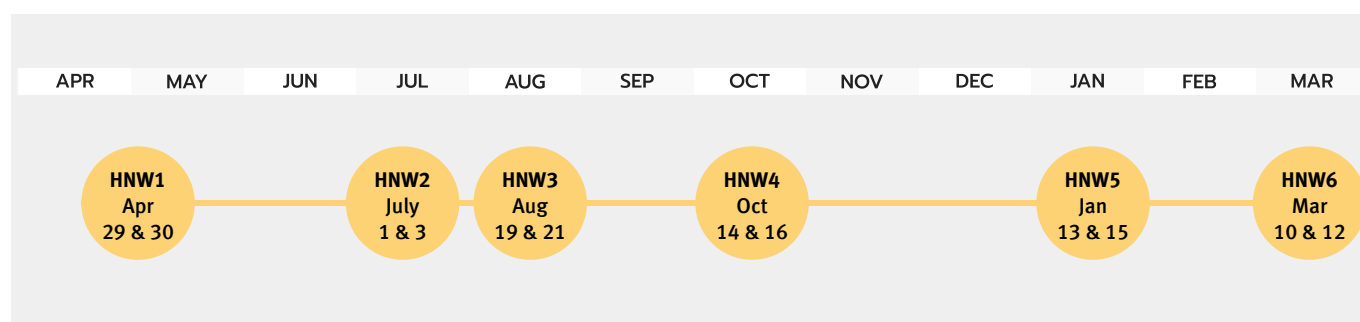


## High Net Worth Certification Programme

### Cohort 2, 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

April 2025	
Online access to subject material	Monday, 21 April
Face to Face Workshop 1	Tuesday, 29 April @ 1:00pm – 5:30pm
Face to Face Workshop 2	Wednesday, 30 April @ 1:00pm – 5:30pm
Assignment due	Wednesday, 7 May

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

June 2025	
Online access to subject material	Monday, 23 June
Face to Face Workshop 1	Tuesday, 1 July @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 3 July @ 1:00pm – 5:30pm
Assignment due	Thursday, 10 July

## High Net Worth Certification Programme

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

<b>August 2025</b>	
Online access to subject material	Monday, 11 August
Face to Face Workshop 1	Tuesday, 19 August @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 21 August @ 1:00pm – 5:30pm
Assignment due	Thursday, 28 August

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

<b>October 2025</b>	
Online access to subject material	Monday, 6 October
Face to Face Workshop 1	Tuesday, 14 October @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 16 October @ 1:00pm – 5:30pm
Assignment due	Thursday, 23 October

### *Subject 5: Private Wealth Investment Strategies and Portfolio Construction*

<b>January 2026</b>	
Online access to subject material	Monday, 5 January
Face to Face Workshop 1	Tuesday, 13 January @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 15 January @ 1:00pm – 5:30pm
Exam	Tuesday, 27 January

# High Net Worth Certification Programme

## *Subject 6: Applied Business Strategy for HNWI's and Family Offices*

<b>March 2026</b>	
Online access to subject material	Monday, 2 March
Face to Face Workshop 1	Tuesday, 10 March 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 12 March @ 1:00pm – 5:30pm
Assignment due	Wednesday, 18 March