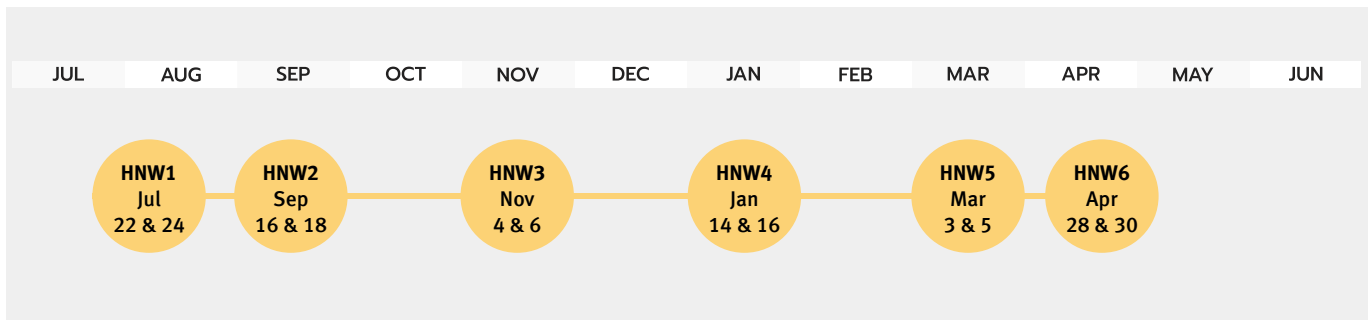


High Net Worth Certification Programme

Cohort 3, 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

| July 2025 | |
|-----------------------------------|-------------------------------------|
| Online access to subject material | Monday, 14 July |
| Face to Face Workshop 1 | Tuesday, 22 July @ 1:00pm – 5:30pm |
| Face to Face Workshop 2 | Thursday, 24 July @ 1:00pm – 5:30pm |
| Assignment due | Thursday, 31 July |

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

| September 2025 | |
|-----------------------------------|--|
| Online access to subject material | Monday, 8 September |
| Face to Face Workshop 1 | Tuesday, 16 September @ 1:00pm – 5:30pm |
| Face to Face Workshop 2 | Thursday, 18 September @ 1:00pm – 5:30pm |
| Assignment due | Thursday, 25 September |

High Net Worth Certification Programme

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

| November 2025 | |
|-----------------------------------|--|
| Online access to subject material | Monday, 27 October |
| Face to Face Workshop 1 | Tuesday, 4 November @ 1:00pm – 5:30pm |
| Face to Face Workshop 2 | Thursday, 6 November @ 1:00pm – 5:30pm |
| Assignment due | Thursday, 13 November |

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

| January 2026 | |
|-----------------------------------|---|
| Online access to subject material | Monday, 5 January |
| Face to Face Workshop 1 | Wednesday, 14 January @ 1:00pm – 5:30pm |
| Face to Face Workshop 2 | Friday, 16 January @ 1:00pm – 5:30pm |
| Assignment due | Friday, 23 January |

Subject 5: Private Wealth Investment Strategies and Portfolio Construction

| March 2026 | |
|-----------------------------------|-------------------------------------|
| Online access to subject material | Monday, 23 February |
| Face to Face Workshop 1 | Tuesday, 3 March @ 1:00pm – 5:30pm |
| Face to Face Workshop 2 | Thursday, 5 March @ 1:00pm – 5:30pm |
| Exam | Tuesday, 17 March |

High Net Worth Certification Programme

Subject 6: Applied Business Strategy for HNWIs and Family Offices

| April 2026 | |
|-----------------------------------|--------------------------------------|
| Online access to subject material | Monday, 20 April |
| Face to Face Workshop 1 | Tuesday, 28 April 1:00pm – 5:30pm |
| Face to Face Workshop 2 | Thursday, 30 April @ 1:00pm – 5:30pm |
| Assignment due | Wednesday, 6 May |