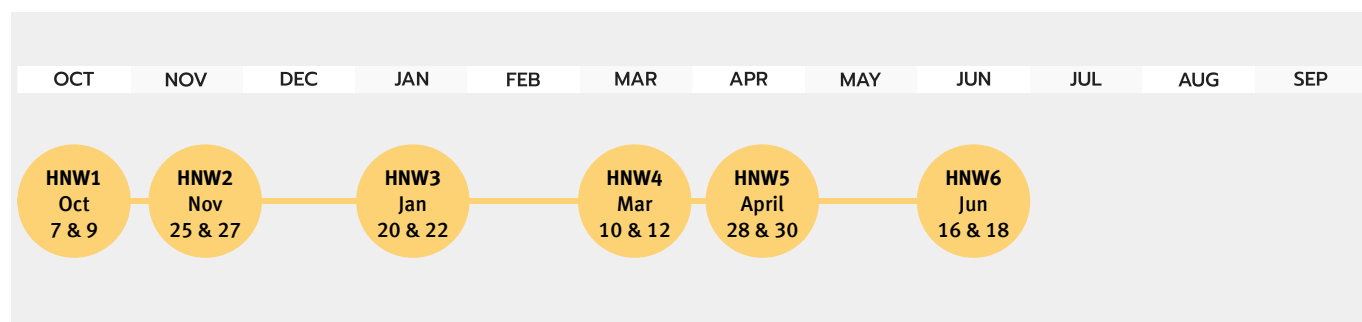


## Cohort 3, 2025 – Key Study Dates and Training Times



\*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

October 2025	
Online access to subject material	Monday, 29 September
Face to Face Workshop 1	Tuesday, 7 October @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 9 October @ 1:00pm – 5:30pm
Assignment due	Thursday, 16 October

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

November 2025	
Online access to subject material	Monday, 17 November
Face to Face Workshop 1	Tuesday, 25 November @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 27 November @ 1:00pm – 5:30pm
Assignment due	Thursday, 4 December

## High Net Worth Certification Programme

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

<b>January 2026</b>	
Online access to subject material	Monday, 12 January
Face to Face Workshop 1	Tuesday, 20 January @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 22 January @ 1:00pm – 5:30pm
Assignment due	Thursday, 29 January

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

<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	Thursday, 19 March

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

<b>April 2026</b>	
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
Exam	Tuesday, 12 May

# High Net Worth Certification Programme

## *Subject 6: Applied Business Strategy for HNWIs and Family Offices*

<b>June 2026</b>	
Online access to subject material	Monday, 8 June
Face to Face Workshop 1	Tuesday, 16 June 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 18 June @ 1:00pm – 5:30pm
Assignment due	Wednesday, 26 June