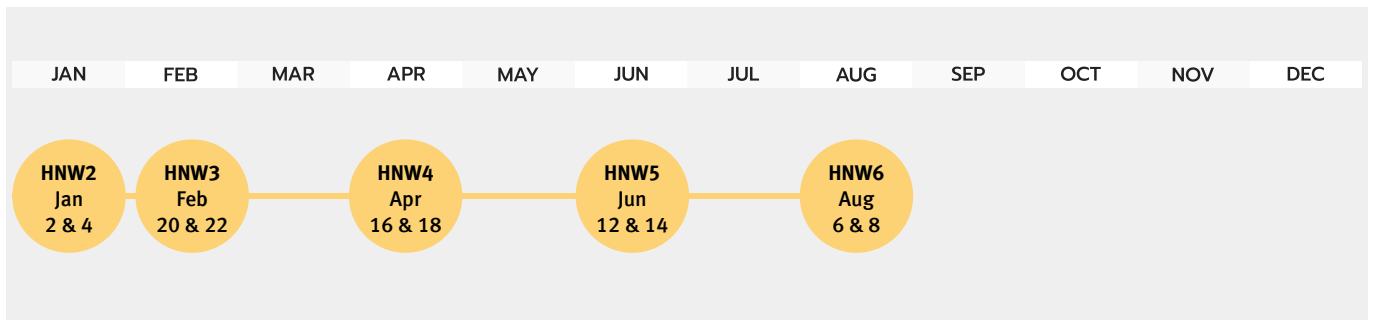


High Net Worth Certification Programme

Cohort 4, 2023 – Students who started in Oct 2023



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

January 2024	
Online access to subject material	Monday, 25 December
Face to Face Workshop 1	Tuesday, 2 January @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 4 January @ 1:00pm – 5:30pm
Assignment due	Thursday, 11 January

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

February 2024	
Online access to subject material	Monday, 12 February
Face to Face Workshop 1	Tuesday, 20 February @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 22 February @ 1:00pm – 5:30pm
Assignment due	Thursday, 29 February

High Net Worth Certification Programme

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

April 2024	
Online access to subject material	Monday, 8 April
Face to Face Workshop 1	Tuesday, 16 April @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 18 April @ 1:00pm – 5:30pm
Assignment due	Thursday, 25 April

Subject 5: Private Wealth Investment Strategies and Portfolio Construction

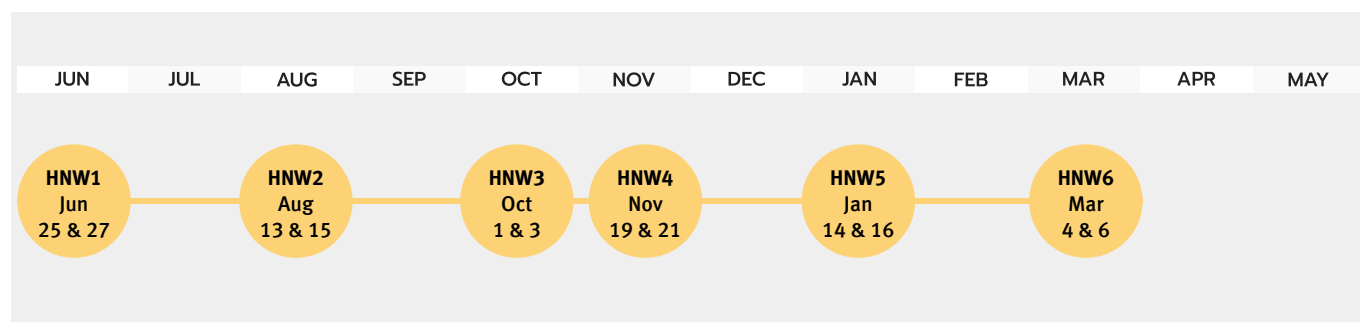
June 2024	
Online access to subject material	Monday, 3 June
Face to Face Workshop 1	Wednesday, 12 June @ 1:00pm – 5:30pm
Face to Face Workshop 2	Friday, 14 June @ 1:00pm – 5:30pm
Exam	Friday, 21 June

Subject 6: Applied Business Strategy for HNWIs and Family Offices

August 2024	
Online access to subject material	Monday, 29 July
Face to Face Workshop 1	Tuesday, 6 August @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 8 August @ 1:00pm – 5:30pm
Assignment due	Thursday, 15 August

High Net Worth Certification Programme

Cohort 4, 2024 – New students starting in 2024



*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

June 2024	
Online access to subject material	Monday, 17 June
Face to Face Workshop 1	Tuesday, 25 June @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 27 June @ 1:00pm – 5:30pm
Assignment due	Thursday, 4 July

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

August 2024	
Online access to subject material	Monday, 5 August
Face to Face Workshop 1	Tuesday, 13 August @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 15 August @ 1:00pm – 5:30pm
Assignment due	Thursday, 22 August

High Net Worth Certification Programme

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

October 2024	
Online access to subject material	Monday, 23 September
Face to Face Workshop 1	Tuesday, 1 October @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 3 October @ 1:00pm – 5:30pm
Assignment due	Thursday, 10 October

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

November 2024	
Online access to subject material	Monday, 11 November
Face to Face Workshop 1	Tuesday, 19 November @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 21 November @ 1:00pm – 5:30pm
Assignment due	Thursday, 28 November

Subject 5: Private Wealth Investment Strategies and Portfolio Construction

January 2025	
Online access to subject material	Monday, 6 January
Face to Face Workshop 1	Tuesday, 14 January @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 16 January @ 1:00pm – 5:30pm
Exam	Friday, 24 January

High Net Worth Certification Programme

Subject 6: Applied Business Strategy for HNWIs and Family Offices

March 2025	
Online access to subject material	Monday, 24 February
Face to Face Workshop 1	Tuesday, 4 March @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 6 March @ 1:00pm – 5:30pm
Assignment due	Thursday, 13 March