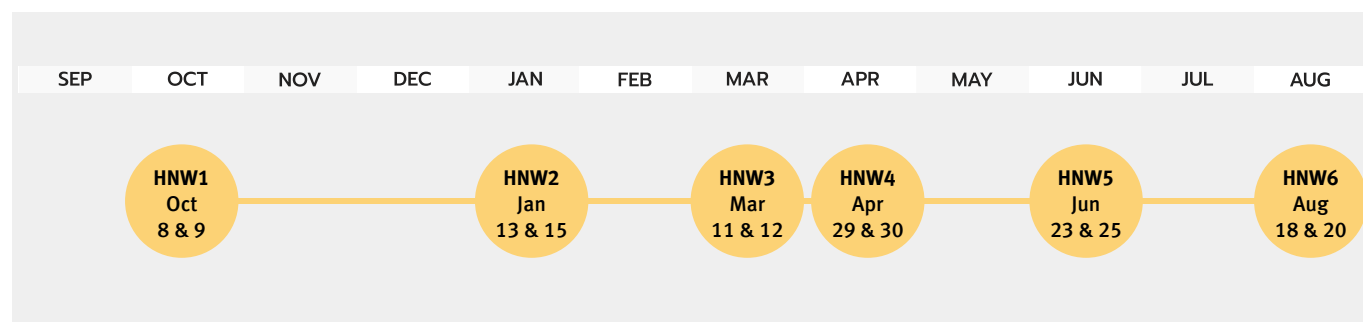


# High Net Worth Certification Programme

## Cohort 4, 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

September 2025	
Online access to subject material	Monday, 29 September
Face to Face Workshop 1	Wednesday, 8 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)

January 2026	
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
Assignment due	Thursday, 22 January

# High Net Worth Certification Programme

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

March 2026	
Online access to subject material	Monday, 2 March
Face to Face Workshop 1	Wednesday, 11 March @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 12 March @ 1:00pm – 5:30pm
Assignment due	Thursday, 19 March

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

April 2026	
Online access to subject material	Monday, 24 April
Face to Face Workshop 1	Wednesday, 29 April @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 30 April @ 1:00pm – 5:30pm
Assignment due	Thursday, 7 May

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

June 2026	
Online access to subject material	Monday, 15 June
Face to Face Workshop 1	Tuesday, 23 June @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 25 June @ 1:00pm – 5:30pm
Exam	Tuesday, 7 July

# High Net Worth Certification Programme

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

August 2026	
Online access to subject material	Monday, 10 August
Face to Face Workshop 1	Tuesday, 18 August 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 20 August @ 1:00pm – 5:30pm
Assignment due	Wednesday, 26 August