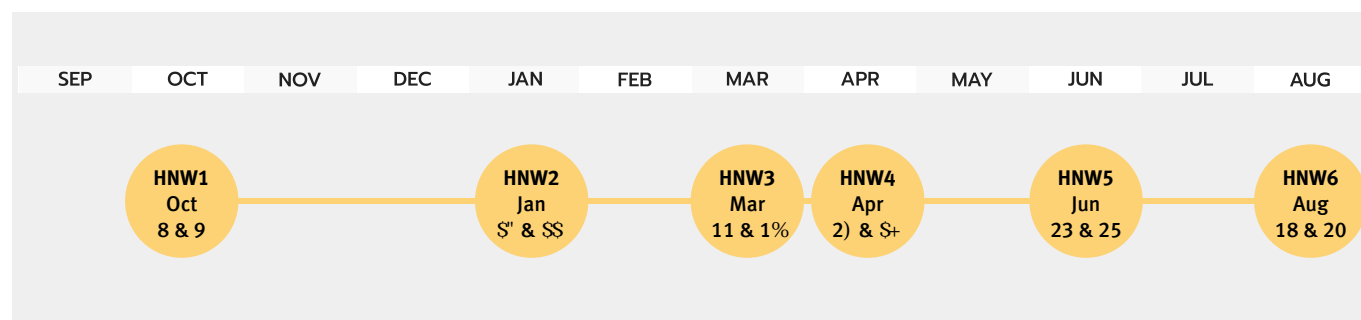


High Net Worth Certification Programme

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

October 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, 19 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

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	Friday, 13 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, 27 April
Face to Face Workshop 1	Monday, 27 April @ 1:00pm – 5:30pm
Face to Face Workshop 2	Wednesday, 29 April @ 1:00pm – 5:30pm
Assignment due	Wednesday, 6 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 HNWIs 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