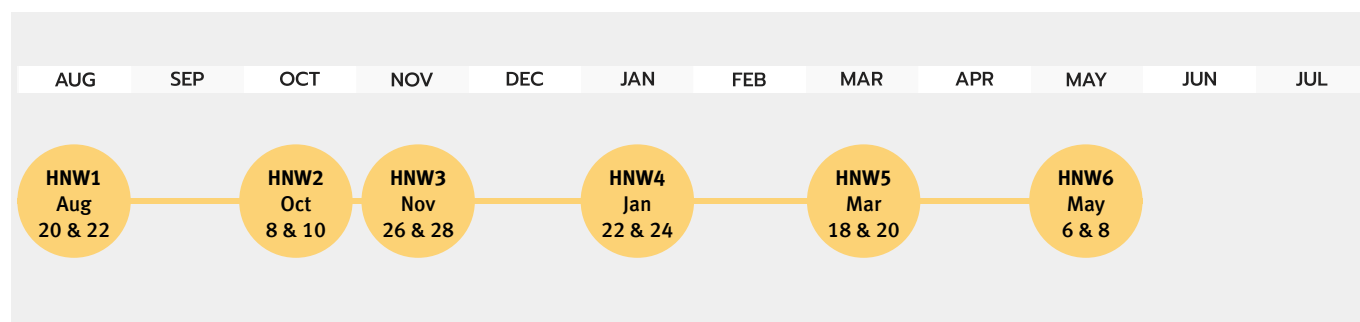


High Net Worth Certification Programme

Cohort 5, 2024 – 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

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

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

October 2024	
Online access to subject material	Monday, 30 September
Face to Face Workshop 1	Tuesday, 8 October @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 10 October @ 1:00pm – 5:30pm
Assignment due	Thursday, 17 October

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

November 2024	
Online access to subject material	Monday, 18 November
Face to Face Workshop 1	Tuesday, 26 November @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 28 November @ 1:00pm – 5:30pm
Assignment due	Thursday, 5 December

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

January 2025	
Online access to subject material	Monday, 13 January
Face to Face Workshop 1	Wednesday, 22 January @ 1:00pm – 5:30pm
Face to Face Workshop 2	Friday, 24 January @ 1:00pm – 5:30pm
Assignment due	Friday, 31 January

Subject 5: Private Wealth Investment Strategies and Portfolio Construction

March 2025	
Online access to subject material	Monday, 10 March
Face to Face Workshop 1	Tuesday, 18 March @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 20 March @ 1:00pm – 5:30pm
Exam	Friday, 28 March

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Subject 6: Applied Business Strategy for HNWIs and Family Offices

May 2025	
Online access to subject material	Monday, 28 April
Face to Face Workshop 1	Tuesday, 6 May @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 8 May @ 1:00pm – 5:30pm
Assignment due	Thursday, 15 May