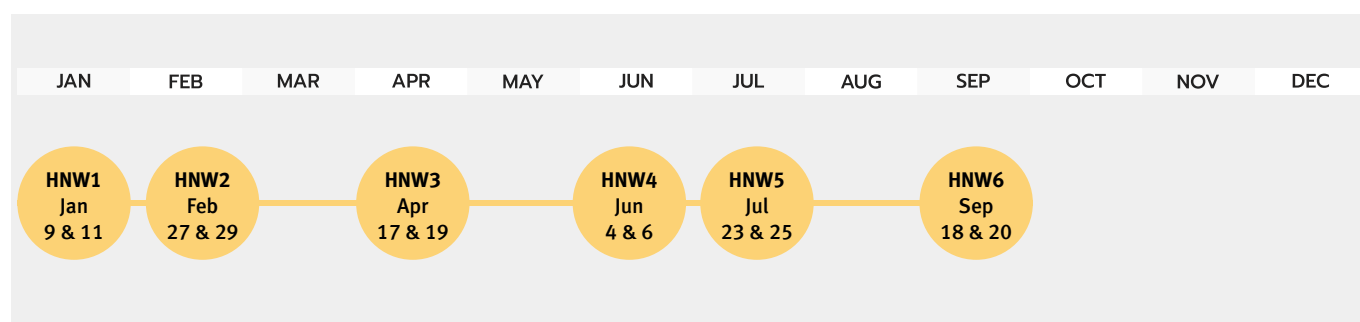


Cohort 1, 2024 – Key Study Dates and Training Times



*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

January 2024	
Online access to subject material	Monday, 2 January
Face to Face Workshop 1	Tuesday, 9 January @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 11 January @ 1:00pm – 5:30pm
Assignment due	Thursday, 18 January

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

February 2024	
Online access to subject material	Monday, 19 February
Face to Face Workshop 1	Tuesday, 27 February @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 29 February @ 1:00pm – 5:30pm
Assignment due	Thursday, 7 March

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

April 2024	
Online access to subject material	Monday, 8 April
Face to Face Workshop 1	Wednesday, 17 April @ 1:00pm – 5:30pm
Face to Face Workshop 2	Friday, 19 April @ 1:00pm – 5:30pm
Assignment due	Friday, 26 April

Subject 4: Private Wealth and Family Office: Environment, Trends and Client Focus

June 2024	
Online access to subject material	Monday, 27 May
Face to Face Workshop 1	Tuesday, 4 June @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 6 June @ 1:00pm – 5:30pm
Assignment due	Thursday, 13 June

Subject 5: Private Wealth Investment Strategies and Portfolio Construction

July 2024	
Online access to subject material	Monday, 15 July
Face to Face Workshop 1	Tuesday, 23 July @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 25 July @ 1:00pm – 5:30pm
Exam	Friday, 2 August

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Subject 6: Applied Business Strategy for HNWIs and Family Offices

September 2024	
Online access to subject material	Monday, 9 September
Face to Face Workshop 1	Wednesday, 18 September 1:00pm – 5:30pm
Face to Face Workshop 2	Friday, 20 September @ 1:00pm – 5:30pm
Assignment due	Friday, 27 September