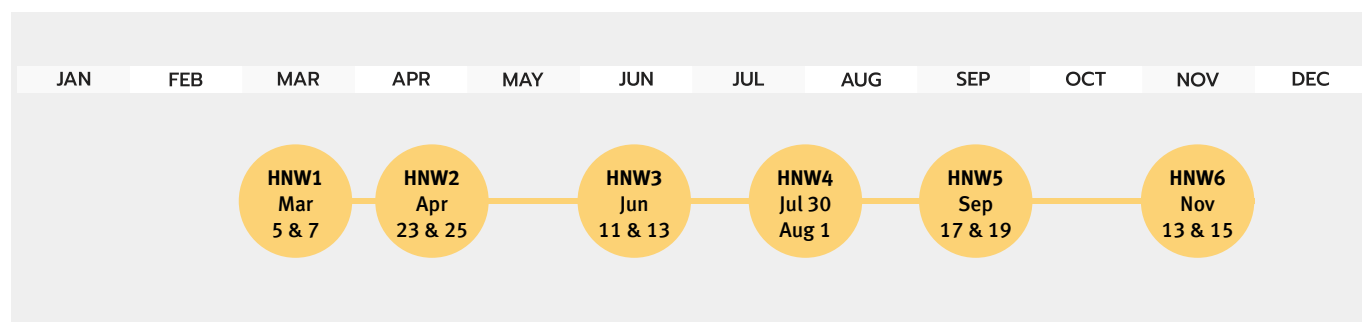


High Net Worth Certification Programme

Cohort 2, 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

March 2024	
Online access to subject material	Monday, 26 February
Face to Face Workshop 1	Tuesday, 5 March @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 7 March @ 1:00pm – 5:30pm
Assignment due	Thursday, 14 March

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

April 2024	
Online access to subject material	Monday, 15 April
Face to Face Workshop 1	Tuesday, 23 April @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 25 April @ 1:00pm – 5:30pm
Assignment due	Thursday, 2 May

High Net Worth Certification Programme

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

June 2024	
Online access to subject material	Monday, 3 June
Face to Face Workshop 1	Tuesday, 11 June @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 13 June @ 1:00pm – 5:30pm
Assignment due	Thursday, 20 June

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

July 2024	
Online access to subject material	Monday, 22 July
Face to Face Workshop 1	Tuesday, 30 July @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 1 August @ 1:00pm – 5:30pm
Assignment due	Thursday, 8 August

Subject 5: Private Wealth Investment Strategies and Portfolio Construction

September 2024	
Online access to subject material	Monday, 9 September
Face to Face Workshop 1	Tuesday, 17 September @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 19 September @ 1:00pm – 5:30pm
Exam	Friday, 27 September

High Net Worth Certification Programme

Subject 6: Applied Business Strategy for HNWIs and Family Offices

November 2024	
Online access to subject material	Monday, 4 November
Face to Face Workshop 1	Wednesday, 13 November 1:00pm – 5.30pm
Face to Face Workshop 2	Friday, 15 November @ 1:00pm – 5.30pm
Assignment due	Friday, 22 November