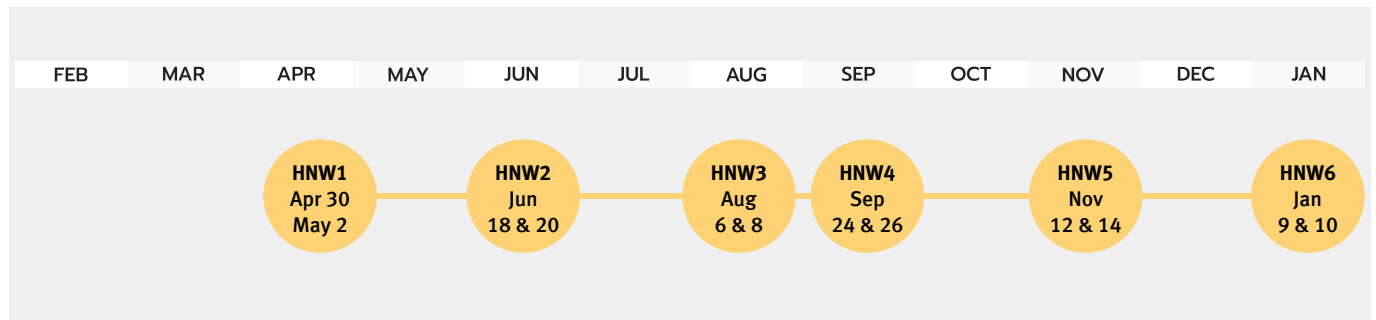


High Net Worth Certification Programme

Cohort 3, 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

April 2024	
Online access to subject material	Monday, 22 April
Face to Face Workshop 1	Tuesday, 30 April @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 2 May @ 1:00pm – 5:30pm
Assignment due	Thursday, 9 May

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

June 2024	
Online access to subject material	Monday, 10 June
Face to Face Workshop 1	Tuesday, 18 June @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 20 June @ 1:00pm – 5:30pm
Assignment due	Thursday, 27 June

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

August 2024	
Online access to subject material	Monday, 29 July
Face to Face Workshop 1	Tuesday, 6 August @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 8 August @ 1:00pm – 5:30pm
Assignment due	Thursday, 15 August

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

September 2024	
Online access to subject material	Monday, 16 September
Face to Face Workshop 1	Tuesday, 24 September @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 26 September @ 1:00pm – 5:30pm
Assignment due	Thursday, 3 October

Subject 5: Private Wealth Investment Strategies and Portfolio Construction

November 2024	
Online access to subject material	Monday, 4 November
Face to Face Workshop 1	Tuesday, 12 November @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 14 November @ 1:00pm – 5:30pm
Exam	Friday, 22 November

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

January 2025	
Online access to subject material	Monday, 30 December
Face to Face Workshop 1	Thursday, 9 January @ 1:00pm – 5:30pm
Face to Face Workshop 2	Friday, 10 January @ 1:00pm – 5:30pm
Assignment due	Friday, 17 January