

High Net Worth Certification Programme

Cohort 4, 2023 – Students who started in Oct 2023

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

January 2024	
Online access to subject material	Monday, 25 December
Face to Face Workshop 1	Tuesday, 2 January @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 4 January @ 1:00pm – 5:30pm
Assignment due	Thursday, 11 January

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

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

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

April 2024	
Online access to subject material	Monday, 8 April
Face to Face Workshop 1	Tuesday, 16 April @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 18 April @ 1:00pm – 5:30pm
Assignment due	Thursday, 25 April

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Subject 5: Private Wealth Investment Strategies and Portfolio Construction

June 2024	
Online access to subject material	Monday, 3 June
Face to Face Workshop 1	Wednesday, 12 June @ 1:00pm – 5:30pm
Face to Face Workshop 2	Friday, 14 June @ 1:00pm – 5:30pm
Exam	Friday, 21 June

Subject 6: Applied Business Strategy for HNWIs and Family Offices

August 2024	
Online access to subject material	Monday, 29 July
Face to Face Workshop 1	Wednesday, 7 August @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 8 August @ 1:00pm – 5:30pm
Assignment due	Thursday, 15 August