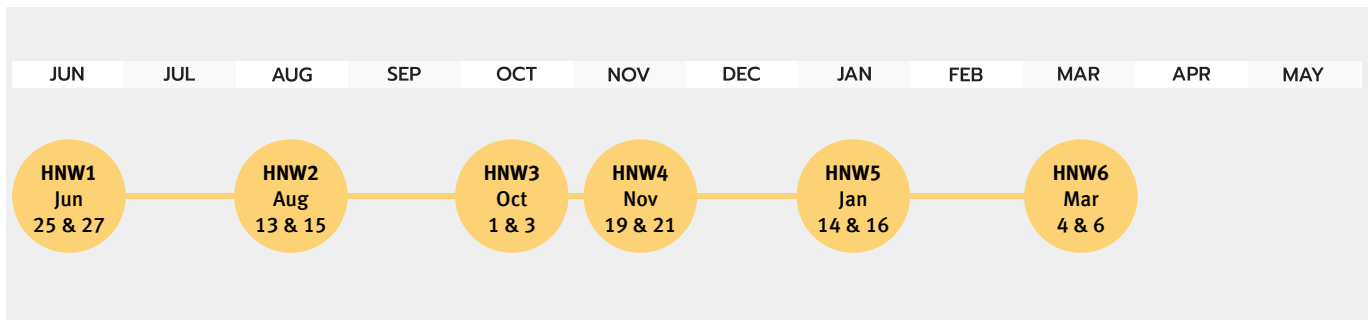


High Net Worth Certification Programme

Cohort 4, 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

June 2024	
Online access to subject material	Monday, 17 June
Face to Face Workshop 1	Tuesday, 25 June @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 27 June @ 1:00pm – 5:30pm
Assignment due	Thursday, 4 July

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

August 2024	
Online access to subject material	Monday, 5 August
Face to Face Workshop 1	Tuesday, 13 August @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 15 August @ 1:00pm – 5:30pm
Assignment due	Thursday, 22 August

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

October 2024	
Online access to subject material	Monday, 23 September
Face to Face Workshop 1	Tuesday, 1 October @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 3 October @ 1:00pm – 5:30pm
Assignment due	Thursday, 10 October

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

November 2024	
Online access to subject material	Monday, 11 November
Face to Face Workshop 1	Tuesday, 19 November @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 21 November @ 1:00pm – 5:30pm
Assignment due	Thursday, 28 November

Subject 5: Private Wealth Investment Strategies and Portfolio Construction

January 2025	
Online access to subject material	Monday, 13 January
Face to Face Workshop 1	Tuesday, 14 January @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 16 January @ 1:00pm – 5:30pm
Exam	Friday, 24 January

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Subject 6: Applied Business Strategy for HNWIs and Family Offices

March 2025	
Online access to subject material	Monday, 24 February
Face to Face Workshop 1	Tuesday, 4 March @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 6 March @ 1:00pm – 5:30pm
Assignment due	Thursday, 13 March