High Net Worth Certification Programme

HNW
High Net Worth Certification

Cohort 6, 2024 – Key Study Dates and Training Times

| OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP |

HNW1 Oct 15 & 17 — **HNW2** Dec 3 & 5 — **HNW3** Jan 21 & 23 — **HNW4** Mar 11 & 13 — **HNW5** Apr 29 & 30 — **HNW6** Jun 17 & 19
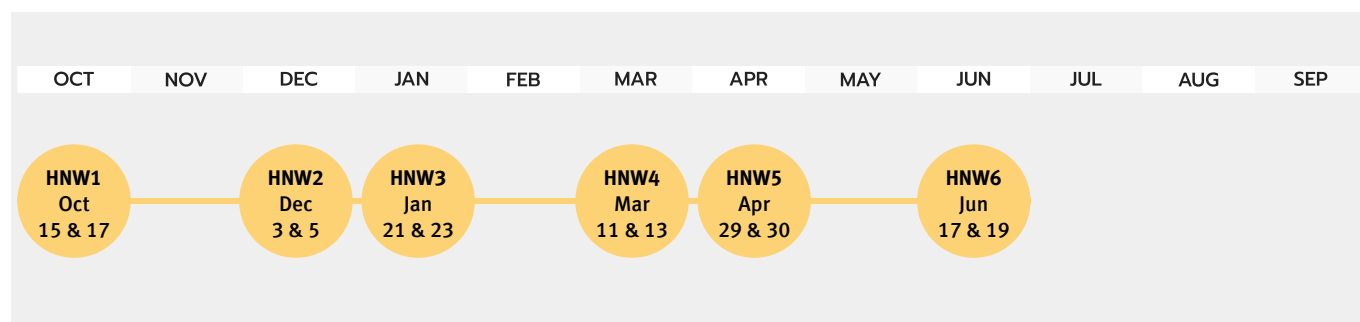
*Workshop attendance dates shown above, is the duration of a nominated cohort journey in sequential subject order for completion in less than 12 months.

Subject 1: Private Wealth and Family Office: Environment, Trends and Client Focus

	October 2024
Online access to subject material	Monday, 7 October
Face to Face Workshop 1	Tuesday, 15 October @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 17 October @ 1:00pm – 5:30pm
Assignment due	Thursday, 24 October

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

	December 2024
Online access to subject material	Monday, 25 November
Face to Face Workshop 1	Tuesday, 3 December @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 5 December @ 1:00pm – 5:30pm
Assignment due	Thursday, 12 December

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

January 2025	
Online access to subject material	Monday, 13 January
Face to Face Workshop 1	Tuesday, 21 January @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 23 January @ 1:00pm – 5:30pm
Assignment due	Monday, 3 February

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

March 2025	
Online access to subject material	Monday, 3 March
Face to Face Workshop 1	Tuesday, 11 March @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 13 March @ 1:00pm – 5:30pm
Assignment due	Thursday, 20 March

Subject 5: Private Wealth Investment Strategies and Portfolio Construction

April 2025	
Online access to subject material	Monday, 21 April
Face to Face Workshop 1	Tuesday, 29 April @ 1:00pm – 5:30pm
Face to Face Workshop 2	Wednesday, 30 April @ 1:00pm – 5:30pm
Exam	Friday, 9 May

Subject 6: Applied Business Strategy for HNWIs and Family Offices

June 2025	
Online access to subject material	Monday, 9 June
Face to Face Workshop 1	Tuesday, 17 June @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 19 June @ 1:00pm – 5:30pm
Assignment due	Thursday, 26 June