



## WMI Advanced Wealth Management Programme (AWMP)

### Course Dates

The AWMP consists of 6 modules. Each module takes up to 4 training days which comprise 2 full Fridays and Saturdays in a month. Participants may enrol for the entire programme or by module (Note: Modules I and II have to be taken together). Course dates are as follows:

	<b>Module I (3<sup>rd</sup> Intake) (2010)</b>	<b>Module II (3<sup>rd</sup> Intake) (2010)</b>	<b>Module III (3<sup>rd</sup> Intake) (2011)</b>	<b>Module IV (3<sup>rd</sup> Intake) (2011)</b>	<b>Module V (3<sup>rd</sup> Intake) (2011)</b>	<b>Module VI (3<sup>rd</sup> Intake) (2011)</b>
<b>Course Dates</b>	3 & 4 Sep and 17 & 18 Sep	1 & 2 Oct and 15 & 16 Oct	14 & 15 Jan and 28 & 29 Jan	4 & 5 Mar and 18 & 19 Mar	1 & 2 Apr and 15 & 16 Apr	13 & 14 May and 27 & 28 May
<b>Assessment Dates</b>	1 Oct	29 Oct	18 Feb	1 Apr	13 May	27 May

*The above dates and timings are indicative and subject to change. Participants will receive the finalised schedule nearer the commencement of the Module.*

### Information on Certificate Attainment

Participants who would like to attain the WMI AWMP Certificate: Relationship Management – High Net Worth (Job Role V) would need to successfully complete **Modules I, II, IV, V and VI**.

Participants who would like to attain the WMI AWMP Certificate: Investment Advisory Services (Job Role V) would need to successfully complete **Modules I, II, III and V**.

Participants who would like to attain the WMI AWMP Certificate: Relationship Management – High Net Worth (Job Role V) and Investment Advisory Services (Job Role V) would need to successfully complete **all the 6 modules**.

Participants who have the relevant working experience (related to RM–HNW, Job Role VI)<sup>+</sup> and who would like to attain the WMI AWMP Certificate: Relationship Management – High Net Worth (Job Role VI) would need to successfully complete **Modules I, II, IV, V and VI** and pass the assessment for Competency Unit 5<sup>++</sup> at the Job Role VI level. A separate assessment fee is payable.

<sup>+</sup> Working experience requirements:

- Minimum of 8 years of relevant working experience in relationship management
- Minimum of 1 year of relevant experience in the role that touches ALL areas of the competencies required for Job Role 6, ie. Team manager in which you are accountable for business bottom-line and involved in strategic decision-making of the department
- For more details, please visit FICS Online Certificate Guide at [www.fics.org.sg](http://www.fics.org.sg)

<sup>++</sup>Competency Unit 5 for Wealth Management: Relationship Management (High Net Worth) – Perform Control and Monitoring Functions. For more information, please visit FICS Standards at [www.fics.org.sg](http://www.fics.org.sg).



## Course Fees and Funding

The fees cover tuition and course materials, and are subject to applicable GST.

Module	Fees before FSDF Funding	Fees after FSDF funding* (please see note below)
Modules I & II (8 days)	S\$8,000	S\$2,000
Module III (4 days)	S\$6,000	S\$600
Module IV (4 days)	S\$6,000	S\$600
Module V (4 days)	S\$6,000	S\$600
Module VI (4 days)	S\$6,000	S\$600

### Note:

- The above fees after FSDF funding is applicable **only** for participants who sign up for the whole programme, ie., either sign up for:
  - All 6 modules, or
  - All modules pertaining to the 'Relationship Management-High Net Worth' Job Family (Modules I, II, IV, V and VI), or
  - All modules pertaining to the 'Investment Advisory Services' Job Family (Modules I, II, III and V).
- Participants must join the programme in September 2010.

*The above fees are indicative and subject to change.*

\*Participants may apply for funding under the **Financial Sector Development Fund (FSDF) for Financial Industry Competency Standards (FICS) Training and Assessment Scheme**^ which provides funding support of 90% of the course fees, capped at S\$6,000 per participant per module. Funding is on a reimbursement basis and subject to eligibility criteria and terms and conditions.

^Financial sector organizations sponsoring Singapore-based participants may obtain grant support from the FSDF for FICS accredited training and assessment programmes. Organizations should submit the funding applications online to the Institute of Banking & Finance (IBF) at [www.ibf.org.sg](http://www.ibf.org.sg). For Individuals (Singaporeans or Singapore permanent residents) who are not sponsored by financial sector organizations and would like to apply for the funding, please complete section 7. Non-sponsored individuals may also include GST for co-funding at 90% within the above cap. For more details on the scheme, please refer to the brochure available at our website [www.wmi.com.sg](http://www.wmi.com.sg) or contact IBF at 6220-8566.

For information on application for **absentee payroll** with the Singapore Workforce Development Agency (WDA), please contact WMI at 6828-6988.

## Application

To apply, please send your application form, the supporting documents and cheque payment (to be in favour of "Wealth Management Institute Pte Ltd") of S\$85.00 as application fee by mail to:

Wealth Management Institute  
60B Orchard Road  
#06-18 Tower 2  
The Atrium@Orchard  
Singapore 238891

Early Application is encouraged.