



CREATING
THE BEST
WEALTH
MANAGERS

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**WE ARE ABOUT
OPPORTUNITIES**

**WEALTH
MANAGEMENT
IS BOTH AN
ART
AND
SCIENCE**

The Wealth Management Institute provides the best channel for aspiring wealth managers as well as experienced wealth management practitioners to access those opportunities.

TO CREATE THE BEST
WEALTH MANAGERS

OUR
PROGRAMMES

COMBINE AN

WITH

PERSP

ASIAN FOCUS

GLOBAL

PERSPECTIVES

WMI PROGRAMMES



"WMI provides a platform for aspiring wealth managers as well as professionals to advance in the industry."



Teng Ngiek Lian
Chief Executive Officer
Target Asset Management

They are designed to keep participants in the forefront of the changing industry environment.

MASTER OF SCIENCE IN WEALTH MANAGEMENT



The Master of Science in Wealth Management is offered in collaboration with the Singapore Management University (SMU) and the Swiss Finance Institute (SFI). Unique features include internships which open doors to career opportunities and an external module which adds an invaluable learning dimension.

“We like the fine mix between academic and practical oriental orientation. The blend of students of different nationalities makes it a good platform to network and exchange views and experiences from their respective countries.”



Wilfried Kofmehl
Head Private Banking SEA
Bank Julius Baer

WMI ADVANCED WEALTH MANAGEMENT PROGRAMME



The FICS-accredited Advanced Wealth Management Programme is specially designed for experienced Relationship Managers, Investment Advisors, and other financial practitioners who wish to deepen their knowledge and skills in wealth management.

“WMI programmes fill an important gap in the fastest growing segment of the banking industry in Asia. It is about developing human talent.”



Aaron Low
Lumen Advisors LLC

WMI CERTIFICATE IN PRIVATE BANKING



The WMI Certificate in Private Banking is a unique FICS-accredited certificate programme designed to provide individuals who are keen to pursue a career in private banking with a strong foundation.

“The WMI Certificate in Private Banking is the cornerstone of our training for new entrants to the relationship manager role. It is comprehensive, rigorous and a perfect induction for aspiring wealth managers.”



Kwong Kin Mun
Managing Director
Head of Private Wealth Management, South East Asia
Deutsche Bank AG

TRUST PROGRAMMES



WMI CERTIFICATE IN TRUST SERVICES

Wealth protection and preservation are increasingly recognised as goals to be achieved by high net worth individuals and their families. The WMI Certificate in Trust Services programme equips the participants with a comprehensive overview of the fundamental tools and solutions available to achieve a client’s long-term financial succession objectives from generation to generation.

WMI ADVANCED CERTIFICATE IN TRUST AND ESTATE PLANNING

AND

WMI ADVANCED CERTIFICATE IN TRUST ADMINISTRATION

The WMI Advanced Certificate in Trust and Estate Planning and the WMI Advanced Certificate in Trust Administration are for the wealth planning practitioners and the wealth administration specialists who require in-depth, comprehensive exposure to and understanding of complex wealth protection, preservation and transfer techniques and strategies required to deliver state-of-the-art, long-term global wealth management solutions to deserving high net worth clients.

UNIQUE FEATURES THAT MAKE A DIFFERENCE



“It’s not only about doing a job better, but also about seizing opportunities, coping with change, keeping updated, never stopping to learn but learning constantly.”



Eli Lenyoun, J.D.
Family Wealth Practitioner

CURRICULUM



“You’re not just learning about the industry, you’re right in the middle of it. WMI’s programmes provide ample opportunities for networking.”



Grant Cheng

Graduate, Master of Science in Wealth Management, 2007

“The external module provides participants with the opportunity to immerse in a different culture with different dynamics. Coupled with the strong foundation in financial instruments, this exposure will put all participants in good stead for this growing industry.”



Elaine Bun

Graduate, Master of Science in Wealth Management, 2008

OUR TEACHERS



“With a teaching faculty made up of professionals and industry practitioners, the students get to learn first hand. WMI programmes are very unique and extremely successful at equipping people with the skills they need.”



Leslie Menkes

Head of the High Net Worth businesses in the Asia Pacific Region including India and Australia
Morgan Stanley

INTERNSHIPS



“The WMI internship programme provides interns with an opportunity to experience the reality of the money management industry. For the prospective employer, it is very much like an extended interview process where an employer gets ample time to assess how a potential candidate will fit.”



Lester Gray

Chief Executive Officer, Asia Pacific
Schroder Investment Management

PASSPORT TO A SUCCESSFUL CAREER

**We open doors
to opportunities.**

“A qualification from WMI will give you a passport to a successful career in wealth management. WMI is where you can learn the technical skills of designing investment solutions for clients, as well as the soft skills of client servicing and relationship management. At WMI, we are training the future leaders of the wealth management industry.”



Mr Ng Kok Song
Group Chief Investment Officer,
Government of Singapore Investment Corporation
Chairman, Wealth Management Institute

STRONG INDUSTRY SUPPORT



“The spirit of partnership between the private, public and educational sectors has proven to be a strong foundation for the Wealth Management Institute’s success in developing talent to manage the region’s growing affluence.”



Deepak Sharma
Chairman
Citi Private Bank

WMI PARTNERS

- Aberdeen Asset Management
- APS Asset Management
- Bank Julius Baer
- Bank Sarasin-Rabo (Asia)
- BlackRock Investment Management (Singapore)
- BNP Paribas Private Bank
- Capital International
- CapitaLand Limited
- CFA Institute
- Citi Private Bank
- Citibank Singapore
- Commerzbank (South East Asia)
- Crédit Agricole Suisse
- Crédit Industriel et Commercial
- Credit Suisse
- Daiwa Asset Management
- Daiwa SB Investments
- Daiwa Securities Group
- Daiwa Wealth Management
- DBS
- Deutsche Asset Management
- Deutsche Bank Private Wealth Management
- Fortis Private Banking (S)
- Fullerton Financial Holdings
- Fullerton Fund Management Company
- Goldman Sachs Asset Management
- Goldman Sachs Singapore Pte
- Government of Singapore Investment Corporation
- HL Bank
- HSBC Private Bank
- ING Asia Private Bank
- Investment Management Association of Singapore
- JPMorgan Chase
- Lion Global Investors
- Lloyd George Management
- Merrill Lynch International Bank
- MFS Investment Management
- Morgan Stanley Investment Management
- Morgan Stanley Private Wealth Management
- Nomura Asset Management
- Nomura Securities
- NTUC Income
- OCBC Bank
- Pacific Asset Management
- Pheim Asset Management (Asia)
- PIMCO
- Pioneer Investment Management
- RBS Coutts Bank
- Reuters
- Schroder Investment Management
- SG Private Banking
- Standard Chartered Bank
- State Street Bank & Trust Company
- State Street Global Advisors
- Target Asset Management
- Temasek Holdings
- The Bank of East Asia
- UBS AG
- UOB Asset Management
- United Overseas Bank

**TEMASEK
HOLDINGS**

Temasek Holdings (Private) Limited



Government of Singapore Investment
Corporation Pte Ltd



swiss:finance:institute

ACCREDITATION

WMI is a Lead Provider of accredited training and assessment programmes under the Financial Industry Competency Standards (FICS), as administered by the Institute of Banking and Finance (IBF).

WMI BOARD OF DIRECTORS

Mr Ng Kok Song	Chairman
Mr Willie W Chan	Director
Mrs Annie Wee	Executive Director & CEO
Ms Cynthia Teong	Deputy CEO

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