

International Certificate in Advanced Wealth Management (ICAWM)

The International Certificate in Advanced Wealth Management is a higher level pathway for wealth management professionals who have achieved the EQF level 4 International Certificate in Wealth and Investment Management (ICWIM).

It explores the wide range of assets and investment products available in the market at an advanced level. You will gain the knowledge to assess a client's current financial position, make suitable investment recommendations, and respond appropriately to the changing needs of the client and circumstances of the market. It covers the macro-economic context of investment advice and planning, the main asset classes, the main investment products, identification, measurement and assessment of investment risks and returns, portfolio planning, construction, review and maintenance and the provision of investment advice including the ability to analyse clients' circumstances and apply suitable investment product recommendations to meet client-led objectives.

This qualification is accredited at EQF Level 5.

Who should take the ICAWM?

The International Certificate in Advanced Wealth Management is suitable for international candidates working in private banking and wealth management roles.

Key Facts

- ◇ Second step in the CISI's wealth/retail pathway – it consolidates knowledge gained from the ICWIM and allows progression to the specialist, Chartered Wealth Manager Qualification
- ◇ Global qualification – provides advanced knowledge of the key wealth management principles without focusing specifically on one jurisdiction
- ◇ Client focused – strong emphasis on the client to help build client confidence and trust
- ◇ Examinable by Computer Based Testing – providing candidates with the flexibility to sit the exam all year
- ◇ Free CISI Student membership – become associated with a Chartered professional body and take advantage of an extensive range of benefits.
- ◇ ACSI designatory letters

Studying for the ICAWM

- ◇ The ICAWM exam is a two-hour, 80 MCQ paper
- ◇ Candidates are advised to allocate approximately 140 hours to prepare for the exam.
- ◇ The exam is delivered by computer based testing at Computer Domain in Mosta.
- ◇ The fee covers the registration, the exam entry, a copy of the pdf workbook and one year student membership.

Syllabus Summary

- ◇ Cash and Money Markets
- ◇ Bonds
- ◇ Equities
- ◇ Other Investments
- ◇ Derivatives
- ◇ Collective Investments
- ◇ Financial Advice
- ◇ Portfolio Management

The qualification explores:

- ◇ The macro-economic context of investment advice and planning
- ◇ The main asset classes; characteristics and applications
- ◇ The main investment products; characteristics and applications
- ◇ Identification, measurement and assessment of investment risks and returns
- ◇ Portfolio planning, construction, review and maintenance
- ◇ Provision of investment advice including the ability to analyse clients' circumstances and apply suitable investme

Higher level CISI qualifications

Further study opportunities include:

- ◇ Private Client Investment Advice & Management (EQF Level 6)
- ◇ Chartered Wealth Manager Qualification (EQF Level 7)

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Registration Form

CISI Fee	One time CISI Registration Fee	[<input checked="" type="checkbox"/>] € 40
ICAWM	Registration & Certification	[<input type="checkbox"/>] € 390
Resit Fee	Exam Re-Sit	[<input type="checkbox"/>] € 300

** the above fees include examination sitting, pdf workbooks and certification*

Personal Information	
Name & Surname: _____	CISI Membership (if any): _____
Date of Birth: ____ / ____ / _____	I.D. No.: _____ Contact No.: _____
Home Address: _____	
E-mail Address: _____	
Office Information	
Office Address: _____	
Office E-mail: _____	Office Tel: _____
I certify that the information hereby provided is true and correct:	
_____ Signature	_____ Date

Refund Policy: Full refund is offered prior to start of course, deducting a €50 administration fee. No refund applicable once the course has started.

Membership: Registration entitles you to become a full registered local member of the ifs Malta. This membership is free and valid for a maximum period of twelve months, after which the Committee will evaluate and consider whether to extend such membership for another fixed period or for an indefinite period of time. Renewal of membership is valid for an additional twelve month period. The local membership is subject to review by the Committee at any time.

Data Protection Notice: ifs Malta holds and processes your personal data in order to give you the full benefits of being a student, for administrative purposes and to inform you of any future ifs Malta events, services and other related information. In instances where employers sponsor their employees for all or parts of the course/s, ifs Malta is bound to inform such employers upon the performance and results of their relevant employees if any assessment parts are carried out. ifs Malta does not sell or give your personal data to any other third party. In the eventuality that ifs Malta would need to give any personal data to a third party, you will on a case-by-case basis, be duly informed and you will also be given the opportunity to refuse that such data be given. You have the right to request access to and rectification of, the personal data concerning you that is held by ifs Malta.