

Wealth Management Expert Certification (WMEC)

This training program covers diversification, duration, risk tolerance, market timing, estate planning and dollar cost averaging - investment vehicles and concepts that lie at the heart of developing an investor profile and implementing successful wealth management strategies. It concludes with a case study integrating several issues common to wealth management that shows the banker/investment advisor how to apply these techniques to real-world situations.

Certification Issued By

**Institute Of Professional Managers (IPM - USA)** Institute Of Professional Managers commenced operations in 2003 in San Francisco USA as an Executive Education programs for positions in Middle East and the Far East, Africa. The founders and owners of the business had worked for many years Executive Education and business training in USA, EU, UK, and Middle East and recognize the growing demand for Executive Education speakers around the world.

Membership Benefits

**High Authority Council for Arab Managers HACAM** believes that this certificate will be a valuable resource for professionals within the Arab world in order to understand how these and other processes for organizational improvement are interrelated. HACAM provides training program in the Middle East and targets Managers of quality-focused organizations/industries, professionals aiming to increase their effectiveness/ productivity and anyone interested in the field of quality.

Who Should Attend?

This program is suitable for individuals working in the financial services, investment management and Collective Investment Schemes (CIS) sub-sectors, specifically in the role of client services, administration, distribution, marketing, call centres and any other support functions.

Eligibility

You are qualified to take this certification if you have any of the below requirements:

- ✓ Must have at least one year experience in related field
- ✓ Bachelors or Masters Degree

Course Parts

- ✓ Financial Markets Explain Money Markets and money market instruments
  - Explain Capital Markets and Capital market instruments
  - Explain Equity Markets and equity market instruments
  - Explain the basic principles of asset management that apply to financial markets and insurance
- ✓ Collective Investment Schemes (CIS) Describe collective investment schemes
  - Outline the structure of the collective investment industry
  - Indicate how collective investment scheme portfolios are reported
- ✓ CIS Administration Explain common transactions in a collective investment scheme portfolio
  - Administer basic client related transactions in a CIS or LISP
  - Money Laundering (FICA)
  - Retirement Funds Investigate the need to provide financially for own retirement
  - Investigate possible funding options for investors exiting a group retirement fund
  - Analyse different group retirement products
  - Analyse the Pension Funds Act as it applies to the administration of retirement funds
- ✓ Financial Planning Explain the structure of the Financial Services industry in SA
  - Investigate the range of options available for Wealth Management FAIS
  - Explain basic investment principles
- ✓ Financial Services Environment Explain basic economics
  - Analyse current events reported in the media that could impact on wealth management
  - Ethical Conduct
- ✓ Personal Finance Interpret Basic Financial Statements
  - Investigate ways of managing financial risks in our own lives
  - Managing risks in our own lives
  - Describe the basic principles of personal Income tax
  - Our programme assumes delegates have matric maths

How To Register?

- ✓ [Register Online](#) or
- ✓ Fill-up the [registration form](#) and visit the Institute, with the following requirements then pay the necessary fees.
  - passport copy
  - 1 copy of passport size photo
  - eligible certificate copy

MANAGEMENT/ADMINISTRATION

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