

Obtain a Global Certification in Wealth Management from AAFM, USA by gaining the **CHARTERED WEALTH MANAGER® (CWM) Certification**



Highest global standards in Wealth Management

BUILDING WEALTH MANAGERS OF TOMORROW



Meet the cutting edge of competitive knowledge

Why CWM® Chartered Wealth Manager®

- It is the **first graduate Wealth Management Charter & Board certification in the world. Featured in** the Investopedia, Forbes, China Daily, Financial Times, Black Enterprise, Wall Street Journal and Money Manager that was created and founded by the AAFM -American Academy of Financial Management.
- **Globally recognized qualification in wealth management industry.**
- **Recognized by top companies in the financial industry around the world** that includes Deutsche Bank, Citibank, Xerox, HSBC, Securities and Exchange Commission of the United States of America, United Overseas Bank Singapore and so forth.
- The CHARTERED WEALTH MANAGER™ certification is awarded directly by the parent body AAFM, USA which makes the CWM® certification truly global and is accepted globally without any territorial limitation. The candidates do not have to undergo any additional certification / examination if he / she want to pursue their career in any other jurisdiction.

Comprehensive curriculum

- Investment Strategies
- Life Cycle Management
- Intergenerational Wealth Transfer
- Relationship Management
- Behavioral Finance
- Alternative Products
- Real Estate Valuation
- Global Taxation....and much more

Pathways to Register

- **Compulsory Pathway**
The eligibility criterion to register through Compulsory Pathway is that the candidate must have passed minimum 12th Standard.
- **Experience Pathway**
The eligibility criterion to register through Experience Pathway is that the candidate must have passed Graduation with 3 years of minimum work experience.

SOPF is now a corporate member of AAFM India

SOPF is a Corporate Member of AAFM India, the organization has joined the movement of establishing the Wealth Management Advisory Services Standards in the country and hence indirectly contributing to the noble cause of bringing the positive change and revolutionizing the financial services industry. Following is the benefits members will get :

- Enroll for the CWMTM certification Program through the Authorized Education Provider (AEP) at a Special Price of Rs. 7500/- as against the actual cost of Rs. 15,000/- (Includes Registration & Courseware Fee Only) and Certification Fee of Rs. 2,000/-
- Special offer from AEP for Tuition fees to be paid in addition
- The programs like seminars, conference, dialogs, etc. conducted by the SOPF towards the development of the Wealth Management and Financial Advisory Services will be considered as part of Continuous Professional Development (CPD) points for CWMTM certification subject to prior intimation by the Corporate Member.
- AAFM India would provide constant opportunities to its members to network and advertise themselves.

If you are interested in pursuing this certification then please contact Mr.Sandeep Vasa /Mr.JayantVidhwans for details

Dear Members

Become a holistic advisor by registering for the highest global standards in Wealth Management

The Chartered Wealth Manager (CWM®) is a professional certification from AAFM® and is the **first graduate Wealth Management Charter & Board certification in the world** as featured in the Investopedia, Forbes, China Daily, Financial Times, Black Enterprise, Wall Street Journal and Money Manager that was created and founded by AAFM ([American Academy of Financial Management](http://www.aafm.com)).

Chartered Wealth Manager® (CWM) comprehensively deals with all aspects of Wealth Management, take a look at the comprehensive curriculum

Level – 1 – Foundation Level

Unit 1	Overview of Indian and Global Financial System
Unit 2	Concept of Wealth Management
Unit 3	Measuring Investment Returns in Wealth Management
Unit 4	Life Cycle Management
Unit 5	Investment Vehicles of Wealth Management
Unit 6	Managing Investment Risk in Wealth Management
Unit 7	Investment Strategies of a Wealth Manager
Unit 8	Intergenerational Wealth Transfer & Tax Planning
Unit 9	Role of Wealth Management in Banking
Unit 10	Legalities in Wealth Management

Level – 2 Advanced Wealth Management Level

Unit 1	Advanced Concept in Wealth Management
Unit 2	Relationship Management by a Wealth Manager
Unit 3	Use of Behavioral Finance in Wealth Management
Unit 4	Wealth Management Planning
Unit 5	Equity Analysis
Unit 6	Portfolio Management Strategies
Unit 7	Loan & Debt Management
Unit 8	Use of Alternative Products in Wealth Management
Unit 9	Real Estate Valuation and Analysis
Unit 10	International Taxation and Trust Planning

SOPF is now a corporate member of AAFM India

SOPF is a Corporate Member of AAFM India, the organization has joined the movement of establishing the Wealth Management Advisory Services Standards in the country and hence indirectly contributing to the noble cause of bringing the positive change and revolutionizing the financial services industry. Following is the benefits members will get :

- Enroll for the CWM™ certification Program through the Authorized Education Provider (AEP) at a Special Price of Rs. 7500/- as against the actual cost of Rs. 15,000/- (Includes Registration & Courseware Fee Only)

- Annual Certification Fee of Rs. 2,000/- only against Rs Rs5,000/- to be paid for year 2
- Avail of special pricing offer one of the AEP for Tution fees to be paid in addition
- Corporate Members would get the privilege of discounted price for attending seminars & events organized by the AAFM India or its alliances.
- The programs like seminars, conference, dialogs, etc. conducted by the SOFP towards the development of the Wealth Management and Financial Advisory Services will be considered as part of Continuous Professional Development (CPD) points for CWM™ certification subject to prior intimation by the Corporate Member.
- AAFM India would provide constant opportunities to its members to network and advertise themselves.

If you are interested in pursuing this certification then please contact Mr.Sandeep Vasa / Mr.Jayant Vidhwans for details and registration process
