WEALTH MANAGEMENT INSTITUTE

Certified Family Office Practitioner

WMI's Signature Family Office Programme	Up to 70% IBF Funding for Singaporeans and Permanent Residents	Complete Any Three Modules to Attain a One-Year Membership to Global-Asia Family Office Circle

Eight Distinct Courses Available	Two Modes of Study: Standalone or Stackable Modules	Contact us at programmes@wmi.edu.sg

Programme Overview

The "Certified Family Office Practitioner" is WMI's new signature programme designed to equip aspiring practitioners with the necessary skill set to navigate the intricate landscape of the Family Office. This comprehensive programme aims to provide a deeper understanding of the Family Office perspectives, internal dynamics and structural setup, allowing participants to emerge as well-rounded practitioners in this field.

The programme is designed to cover a range of essential competencies and knowledge areas that aspiring professionals need to master in order to advance their careers in the family office sector

Taught by leading family office professionals with deep domain expertise, these modules provide a structured learning pathway for family office professionals to deepen and expand their technical skills and competencies as defined in the Family Office job family within the Skills Framework for Financial Services.

This stackable approach enables participants to complete the programme at their preferred pace, giving them the flexibility to balance their learning with their other professional commitments.

The participant will be offered a complimentary one-year membership to the Global-Asia Family Office Circle with completion of any three modules within the programme.

Who should attend

- Trust Administrator/ Manager
- Wealth Planner and Estate Planner
- Trust Relationship Managers
- Lawyer
- Family Office Advisor
- Client Advisor
- Client Relationship Managers handling UHNW and Family Office segment
- External/ Independent Asset Manager
- Financial Planner

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Wealth Management Institute International
PEI Registration No. 202025818D
Validity: 17 Sep 2020 to 16 Sep 2024

edutrust SINGAPORE
Cert No. : EDU-2-2155
Validity: 18/01/2023 - 17/01/2027

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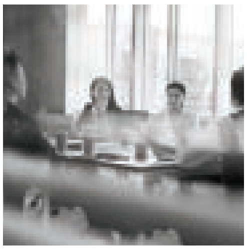
Programme Structure

Core Modules



Certificate for Family Office Practitioner - Managing Family Dynamics
(Eligible for 8 CPD hours)
This course provides a good overview of the Family Office landscape in Singapore and around the world.

Participants will learn about the Family Office ecosystem as well as the various structures used across generations through history, and the reason behind the structures.

Participants will also understand how the family offices are governed in varying complexity and learn how to manage family dynamics such as family conflicts and priorities.

Certificate for Family Office Practitioner – Legacy and Impact for the Family
(Eligible for 8 CPD hours)
Families are increasingly becoming more involved in creating their legacy through philanthropic giving and the impact they have.

This course provides a good introduction to how families of wealth approach philanthropy and impact investing. Participants will first learn about broad global trends, themes and concepts in relation to philanthropy and how to help the family identify their giving objectives. They will also learn about how some families are increasingly aligning their giving to sustainability themes and understand how ESG factors matter in not just giving but also the investment activities and decisions of the family.

Certificate for Family Office Practitioner – Family Office Investments
(Eligible for 8 CPD hours)
Through this course, participants will understand the fiduciary duty of the family office executive in managing assets across generations.

Participants will examine the needs of the family in deciding investment principles with an emphasis on the longevity and preservation of capital across generations.

Certificate for Family Office Practitioner – Family Office Management and Operations
(Eligible for 10 CPD hours/ 3 FAA/ SFA CPD hours)
This course provides an overview of the key considerations surrounding the family office set-up, infrastructure and operations.

Participants will also learn about key risk considerations such as cybersecurity, family/principal reputation, operating risks (including manpower), etc and also understand the regulatory and financial reporting obligations of the family office. Participants will also learn how to identify stakeholders and how to engage and manage them.

Certificate for Family Office Practitioner – Succession and Wealth Transfer
(Eligible for 8 CPD hours)
This course introduces the concepts around succession and the transfer of wealth from generation to generation and provides an overview of common approaches and practices around the world.

Participants will learn about the various wealth planning tools and solutions typically relevant to the ultra-high net worth segment and gain and understanding of how each of these may be used effectively. Participants will also learn about common challenges faced by families, especially where they are multi-jurisdictional and multi-generational and what these families need to consider when thinking about succession. Participants will also learn to identify best practices of managing private family wealth, risks associated with succession planning, and approaches in initiating wealth transfer discussions with the Family.

Family Office Risk Management & Controls
(Eligible for 8.5 CPD hours)
This course will equip participants to grasp the regulatory environment for family offices, examine key regulatory and compliance risks, and identify solutions to address and mitigate these risks balancing robust risk management and innovation.

Elective Modules

Certificate in Introduction to ESG Advisory
(Eligible for 4 CPD hours)
The course introduces the basic concepts of ESG. Sustainable investments are critical to addressing the energy transition, which has a multi-trillion-dollar capital requirement. UHNW clients and family offices are increasingly demanding that both financial performance and non-financial factors, such as ESG, be considered.

Certificate in Introduction to Climate and Decarbonisation Strategies
(Eligible for 8 CPD hours)
The Certificate in Introduction to Climate and Decarbonisation Strategies is a one-day program that equips participants with a comprehensive grasp of foundational climate science principles, the ability to interpret international climate agreements, and the skills to seamlessly integrate sustainability considerations into financial strategies.

Accreditation & Fee Breakdown

Fees shown are after IBF-STS funding. Subsidised# fees apply upon participants' successful completion of the programme, which includes (i) fulfilling minimum attendance requirements and (ii) passing all relevant assessments.

The information above is correct at the time of publication. Wealth Management Institute reserves the right to amend the fees and/or terms and conditions as appropriate.

	Full Fees		Fees After IBF subsidy (Inclusive of 9% GST)	
	Before GST	After GST	**Singaporeans Aged Below 40/ Permanent Residents** (50% IBF-STS Funding) Company & Self-Sponsored	**Singaporeans Aged Above 40** (70% IBF-STS Funding) Company & Self-Sponsored
Core Modules				
Certificate for Family Office Practitioner - Managing Family Dynamics	S$2,000	S$2,180	S$1,180	S$780
Certificate for Family Office Practitioner – Legacy and Impact for the Family	S$2,000	S$2,180	S$1,180	S$780
Certificate for Family Office Practitioner – Family Office Investments	S$2,000	S$2,180	S$1,180	S$780
Certificate for Family Office Practitioner – Family Office Management and Operations	S$2,500	S$2,725	S$1,475	S$975
Certificate for Family Office Practitioner – Succession and Wealth Transfer	S$2,000	S$2,180	S$1,180	S$780
Family Office Risk Management and Controls	S$2,000	S$2,180	S$1,180	S$780
Elective Modules				
Certificate in Introduction to ESG Advisory	S$2,000	S$2,180	S$1,180	S$780
Certificate in Introduction to Climate and Decarbonisation Strategies	S$2,000	S$2,180	S$1,180	S$780

Subsidies are subject to change by IBF and fees will be adjusted based on prevailing funding rates.

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