Certified Family Office Advisor

Accredited under IBF-STS | Wealth Management Institute One Marina Boulevard, #16-01 | Taught by distinguished faculty

Up to 70% IBF Funding for Singaporeans and Permanent Residents | Contact us at programmes@wmi.edu.sg

The "Certified Family Office Advisor" is WMI's signature programme designed to build capabilities for the existing advisors to Family Offices. Through practice-led discussion, participants learn the key communication strategies to establish family constitution, vision, and charter, and emerge with key competencies in the aspects of wealth succession tools, family governance tools and structures, investment landscape, and the specifics of managing transgenerational family assets.

Programme Structure

The programme has been structured into 2 parts.

- Part 1 – Certificate for Family Office Advisors – Foundation (3 days)
- Part 2 – Certificate for Family Office Advisors – Advanced (5 days)

Completion of the Certificate for Family Advisors – Foundation programme is required prior to taking the Certificate for Family Office Advisors – Advanced programme.

The participant will be offered a complimentary 1-year Membership to the Global-Asia Family Office Circle.

Who should attend

Individuals with more than 3 years of relevant experience and demonstrated applied knowledge in the various functions within the family office segment

- Multi and Single Family Office Representatives
- Wealth Planning Professionals
- Private Bankers and Client Relationship Managers handling UNHW and Family Office segment
- Family Trust Consultants
- Private Client Practice Professionals including lawyers and accountants
- External Asset Management Professionals
- Financial Planners

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Programmes & Curriculum

Certificate for Family Office Advisors – Foundation (Eligible for 20 CPD hours and 3 SILE CPD hours)

Drawing on real-world case studies, the foundation level facilitates the overall understanding of the types of family offices, their different functions, the legal and fiscal context in which they operate, as well as the means and tools that can help protect wealth for the long term. A significant part of the learning will seek to understand the human context of wealth owners: individuals, entrepreneurs and families.

This is the first of a two-part programme and is required prior to taking the Certificate for Family Office Advisors – Advanced programme.

No	Module
1	**Mapping the Family Office World**
2	**The Singapore Landscape**
3	**Looking through the Lens of the Family**
4	**Structuring the Family Office**
5	**Preparing the Next Generation**
6	**Planning for the Long Term**

Certificate for Family Office Advisors – Advanced (Eligible for 31.5 CPD hours and 3.5 SILE CPD hours)

Taking participants beyond the Whats and Hows of Family Offices, the advanced level delves deeper by first shedding light on the heart of today's UHNW families. The programme explores the psychology and motivations of today's affluent dynasties, uncovering an array of opportunities available, including the fast-emerging area of impact investing — for clients who wish to reflect their values for society and the environment in their wealth decisions.

This is the second part of a two-part programme. Completion of the Certificate for Family Advisors – Foundation programme is required prior to taking the Certificate for Family Office Advisors – Advanced programme.

No	Module
1	**Certificate for Family Office Advisors – Advanced** Responsible wealth, caring wealth Responsible finance A holistic perspective of family offices: bridging the gap & moving ahead Wealth, family, psychology
2	**Certificate for Family Office Advisors Advanced – Investing and Risk Management for the Family** Investing for the Family A deeper look at direct private equity investments Risk management for the Family
3	**Certificate in Environment and Social Governance for Family Offices** (This module may be taken as a standalone) Approach to sustainable investing Outline the end-to-end trust administration process Integrate ESG research into investment research across asset classes and alternative investments Communicate ESG investment approaches with clients

Fees and Funding

Singaporeans and Permanent Residents are eligible for funding support of up to 70% of direct training cost under the IBF Standards Training Scheme (IBF-STS).

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 before Subsidy			Fees after IBF subsidy (inclusive of 9% GST)	
	Before GST	After GST	Singaporeans Aged Below 40/PR	Singaporeans Aged 40 & Above
Certificate for Family Office Advisors – Foundation	S$6,000.00	S$6,540.00	S$3,540.00	S$2,340.00
Certificate for Family Office Advisors – Advanced	S$8,500.00	S$9,265.00	S$5,015.00	S$3,315.00
TOTAL	**S$14,500.00**	**S$15,805.00**	**S$8,555.00**	**S$5,655.00**

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