WEALTH MANAGEMENT INSTITUTE

Advanced Diploma in Investment and Wealth Management (ADIWM)

Enjoy flexibility with stackable modules towards achieving an Advanced Diploma

Eligible for CPD and Core Hours

Up to 70% IBF-STS Funding for Singaporeans and Permanent Residents

Course fee of S$5,355 after 70% IBF-STS funding (before GST)

The Advanced Diploma in Investment and Wealth Management (ADIWM) is a leading programme specially designed for those who want to build deeper expertise as an investment or wealth management professional.

The Programme offers a stackable structure to offer maximum flexibility for busy professionals. The ADIWM is structured with 6 core modules and a selection of one out of 5 electives. The core modules represent fundamental principles and topics across investment and wealth management disciplines. The elective tracks help students explore and develop their areas of focus and/or specialisation.

- Incorporates core topics for the disciplines of investment management and wealth management, as well as leading-edge topics such as ESG, Digital Assets and Family Office.
- Leverages the latest education technology, utilising Generative AI Virtual Tutor in the Dalio Market Principles online programme
- Provides a solid foundation and enables its graduands to network with like-minded professionals working in Financial Advisory, Family Office and Wealth Management sectors

Who should attend

- Fresh graduates or young professionals seeking to acquire investment and wealth management competencies
- Existing professionals who aspire to deepen their competencies or mid-career switchers looking to join the investment and wealth management sector

Register your interest now:
openprog@wmi.edu.sg

Register Now

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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One Marina Boulevard, Singapore 018989
Tel. +65 6994 5630 | wmi.edu.sg

Advanced Diploma in Investment and Wealth Management

6 Core Modules

Dalio Market Principles (DMP) Online Program

Investment Principles (15 hours)

- Mechanics for Building Portfolios: Total Return = Risk Neutral Position + Beta + Alpha
- Building the Best Portfolio of Alphas and Betas
- Engineering Portfolios and Stress-Testing
- Building a Portfolio for Today's Conditions

Economic Principles (15 hours)

- How the Economic Machine Works
- Understand the Economic Cycles, Deleveraging and Balance of Payments
- Productivity and the Changing World Order
- Applying the Economic Template to Today's Conditions

Ethics, Compliance and Moral Dilemmas (13 hours)

- Rules and Regulations governing investment and wealth management
- What is Ethical Conduct
- Discussion of real case studies from the industry

Introduction to ESG Advisory (8 hours)

- What is ESG and the types of ESG investment strategies
- Sustainability trends and social/ environmental risks in the non-financial industries to stakeholders
- Different sustainable investment approaches and its application to the organisation's portfolio strategies to customers

Multi-Asset Investing (15.5 hours)

- Understand the Public and Private Markets
- Evaluate market developments and its impact on investment portfolios
- Build a well-balanced and resilient multi-asset portfolio

Wealth and Legacy Planning (11 hours)

- Overview of Wealth Planning
- Understanding Legal Systems & Impact on Inheritance
- What are the different tools in a wealth planner's toolbox

Alternatives Investing (8 hours)

- What are Alternative Investments
- The common types of alternatives and their risk-reward characteristics
- Using Alternative Investments in an investment portfolio

Elective Modules

Students will select one of the following tracks:

Client Management (Investor Management) 13 hours	**Client Management (Private Banking)** 20 hours	**Family Office** 16 hours	**Digital Investments** 16.5 hours	**Fintech and Technology** 19.5 hours

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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).

Singaporeans may utilise your SkillsFuture Credit (base tier) to further offset the nett fee payable after subsidies.

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.

Course Fee before subsidy		Course Fee after IBF subsidy (inclusive of 9% GST)	
Before GST	After GST	Singaporean Aged Below 40 / PR	Singaporean Aged 40 & Above
S$17,850	S$19,456.50	S$10,531.50	S$6,961.50