



The International Certificate in Wealth and Investment Management (ICWIM) course is a professional certification program designed for individuals seeking to enhance their knowledge and expertise in the field of wealth and investment management. Offered by the Chartered Institute for Securities & Investment (CISI), the ICWIM certification is recognized globally and signifies a high standard of competence and professionalism in wealth management.

Here's an overview of the ICWIM course:

Objective: The primary objective of the ICWIM course is to provide participants with a comprehensive understanding of wealth management principles, investment strategies, and regulatory frameworks. It equips candidates with the necessary skills to advise clients effectively on wealth preservation, growth, and financial planning.

Curriculum: The course curriculum covers a wide range of topics relevant to wealth and investment management, including but not limited to:

Investment products and asset classes

Portfolio management techniques

Risk management and mitigation strategies.

Taxation considerations

Regulatory and ethical considerations in wealth management

Client relationship management and communication skills

Examination: To obtain the ICWIM certification, candidates typically need to pass a rigorous examination administered by the CISI. The exam assesses candidates' knowledge and understanding of the course material and may consist of multiple-choice questions, case studies, and scenario-based assessments.

Preparation: Candidates preparing for the ICWIM exam often utilize study materials provided by CISI or reputable third-party providers. These materials may include textbooks, study guides, practice questions, and online resources to help candidates prepare effectively for the exam.

Benefits: Earning the ICWIM certification offers several benefits, including:

Enhanced career prospects: The certification demonstrates expertise and credibility in wealth management, potentially opening up new career opportunities and advancement prospects.

Client confidence: Clients may have increased confidence in advisors who hold professional certifications, leading to stronger client relationships and business growth.

Continuing professional development: Maintaining the certification requires ongoing professional development, ensuring that certified professionals stay up-to-date with industry trends and regulatory changes.

Overall, the ICWIM course provides participants with the knowledge, skills, and credentials necessary to excel in the dynamic and competitive field of wealth and investment management.

Eligibility: BBA/B. Com /M.Com.

Total Hours :100 Hrs

Course Fee: ₹55,000(Rupees Fifty Five Thousand Only)

Institutional Partner: Chartered Institute for Securities & Investment (CISI) and Green Apple.