Finance and Banking

Certified Private Wealth Advisor (CPWA)

Curriculum

Program Outline

Module 1: Introduction to Wealth Management

- Basics of wealth management and its importance.

Module 2: Investments I

- Techniques for managing and analyzing investments.

Module 3: Investments II

- Advanced investment strategies.

Module 4: Tax Planning I

- Basics of effective tax planning for high-net-worth clients.

Module 5: Tax Planning II

- Advanced tax planning techniques.

Module 6: Estate Planning I

- Understanding and implementing estate planning techniques.

Module 7: Estate Planning II

- Advanced estate planning strategies.

Module 8: Financial Planning I

- Comprehensive financial planning strategies.

Module 9: Financial Planning II

- Advanced financial planning techniques.

Module 10: Practice Management I

- Techniques for managing a wealth advisory practice.

Module 11: Practice Management II

- Advanced practice management strategies.

Module 12: Scenario and Sensitivity Analysis I

- Basics of performing scenario and sensitivity analysis.

Module 13: Scenario and Sensitivity Analysis II

- Advanced scenario and sensitivity analysis techniques.

Module 14: Wealth Management Ethics

- Understanding and applying ethical standards in wealth management.

Module 15: Communication in Wealth Management I

- Basics of enhancing communication and interpersonal skills in wealth management.

Module 16: Communication in Wealth Management II

- Advanced communication techniques in wealth management.

Websites:

- https://chools.in/
- https://ramaqchools.com/
- https://www.choolsgroup.com/