國際爭議解決及專業談判研究院
Academy of International Dispute Resolution & Professional Negotiation

# Senior International Wealth Manager Training Certificate Course

# 高級國際財富管理師證書課程

# (Course WM02)

The development of globalization facilitates an increasing trend of ultra-high-net-worth individuals (UHNWI) cross-national investments. They utilize the difference in legal terms and regulation in different regions, yielding them greater investment profit and creating better market opportunities. On the other hand, family inheritance management is another important challenge faced by UHNWI, and it is not a small market. According to related research, it is estimated 60 trillion RMB of wealth from the first-generation founders to the second-generation over the next 30 years in China. These combined have opened a huge global market in the industry of professional wealth management.

To elaborate, the attention to wealth inheritance and wealth security has gradually increased in society. Such phenomena also apply to the demand for domestic and international legal and tax services that are provided by professional institutions. This means, there is a need for teams of professionals specialized in wealth and family inheritance management in the market, that is capable to service the UHNW groups. It is a team full of experienced client managers and product specialists from international private banks, helping our clients to customize appropriate investment strategies, seizing earning opportunities, and solve different problems in wealth management and family heritage.

**Introduction of the course**

The Senior International Wealth Manager Training Certificate Course (WM02) is conducted by the Academy of International Dispute Resolution and Professional Negotiation (AIDRN). This is the advanced course of the foundation course Professional Wealth Manager Training Certificate Course (WM01); allowing the CPWM of IPDRA to be trained and equip the necessary skill and knowledge for the “Certified Senior International Wealth Manager” (CSIWM) accreditation.

The course is designed to touch on the up-to-date and practical knowledge in the field of asset and wealth management; it is also delivered by professional lecturers and international experts in wealth management in various fields.

The course helps participants to equip the skills and knowledge required for exploring and serving customers of UHNW individuals. We will explore different topics in the international wealth management, including global residence, investment immigration, overseas education for children, diversified asset allocation, global business development, retirement and security, education for future generations, international taxation and other investment for international asset. Not only you are competent to service the UHNW with customized and most suitable plans for family wealth and asset management, you would also earn the title as "Certified Senior International Wealth Manager" of the International Professional Dispute Resolution Advocate Association (IPDRAA) once you passed the accreditation.

**International Professional Dispute Resolution Advocate Association - Asset management and family wealth management office (IPDRAA – AMFWMO)** provides professional consultation service for high-net-worth individuals (HNWI) and ultra-high-net-worth individuals (UHNWI). We offer top-notch and quality-assured services including asset allocation portfolios and long-term investment consulting services, family inheritance services, family trusts, insurance allocations, tax planning, marriage planning, legal consultation, and family business management.

Headquartered based in Hong Kong and with branches in major domestic cities in the Mainland China, IPDRAA gathers professional talents in trust, insurance, finance and taxation, lawyers, banks, securities, investment and other fields, who are committed to providing customized and exclusive solutions for HNWI and UHNWI with one-stop solution service.

**Target participants**

Entrepreneurs, corporate holder, family business owner and successors, consultants for family business, bankers, asset management professionals, insurance and investment consultants, legal professionals and individuals interested in asset management and family business management.

**Course detail**

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| Course Name | Senior International Wealth Manager Training Certificate Course **(Course WM02)** |
| Duration | Lecture hours – 26 hours<br>Self-study hours – 10 hours |
| Fee | HKD$16,000<br><br>Included:<br>• HKD$14,000 (Discounted; original: HKD$18,000) &<br>• HKD$2,000 (International Accreditation Assessment fee) |
| Course Medium | Mandarin, Cantonese and English |
| Course mode | Lectures, group discussions, case sharing and role play exercises |

**Benefits of this course**

1. The course is taught by celebrated experts from the wealth and asset management industry, allowing participants to obtain both theoretical knowledge and practical experience in wealth management. Our exercises are designed to enhance your understanding and skillsets required to serve your clients, lifting the relationship in between;
2. Value the importance of case studies, our series of role-play exercises are designed to offer unique practical experience for our participant to cater adequately different needs of clients
3. The participant who fulfills the criteria for certification is eligible for the accreditation for Certified Senior International Wealth Manager (CSIWM) at the IPDRAA
4. The CSIWM is awarded to individuals who are competent for professional wealth and asset management service. It is the credential that shows advanced skills, knowledge and professional conduct to clients.
5. The IPDRA offers a specific professional profile of our CSIWM in the archive and the website. Our client can efficiently contact and seek service from our IPDRA's CSIWM.
6. The Certified Senior International Wealth Managers who performed excellently and possess huge field experience would have the opportunity to become the mentors and trainers at the Senior International Wealth Manager Training Certificate Course.

**Certification**

- The "Certificate of Completion" will be awarded to participants who attain 100% attendance in the course, and pass the end-of-course assessment.

- Participants who obtained the "Certificate of Complete" of this course are eligible for the "Accreditation for Certified Senior International Wealth Manager (CSIWM)" at the IPDRAA. Upon successfully passed the accreditation, participants are qualified to be enlisted at the IPDRAA panel of Certified Senior International Wealth Manager (CSIWM). They have the opportunity for up-taking the asset management and family wealth management cases in Hong Kong, Mainland China and oversea referred by the International Professional Dispute Resolution Advocate Association - Asset management and family wealth management office (IPDRAA – AMFWMO).

**Course Content**

| Topics | Content | Lecture hours | Self-study hours |
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| 1. Fundamentals of International Wealth Management | • The case studies on international wealth management and family wealth inheritance<br>• The challenges and business opportunities in international wealth management<br>• Impact of nationality and rules in international wealth management<br>• The prospect and significance of international wealth inheritance<br>• The management of asset and global wealth allocations<br>• Choosing the appropriate international asset management and family wealth inheritance services | 3 hours | 2 hours |

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| 2. Risk Prevention and Management of Wealth Management (1) | • The application and asset management in International family trust<br>• International family trust and asset preservation | 6 hours | 2 hours |
| 3. Risk Prevention and Management of Wealth Management (2) | • Providing consultations for UHNW families (global residence, investment immigration, and overseas education for children, diversified asset allocations, global business development, retirement and security, and education for future generations)<br>• Application of international trust<br>• Comparisons on inheritance taxations and regulations between overseas and China<br>• Other investment options for international asset | 6 hours | 2 hours |
| 4. Management plans for global wealth inheritance | • Formulating efficient global family wealth inheritance plans<br>• Practice with case study | 5 hours | 2 hours |
| 5. Disputes and Dispute Resolution in Family Wealth Inheritance | • Dispute resolution for cross-border family wealth inheritance disputes<br>• Practice with case study | 5 hours | 2 hours |
| 6. Professional Conduct and Management | • Code of ethics of the Certified Senior International Wealth Managers (CSIWM) | 1 hour | |
| 7. International qualification accreditation | • Accreditation procedures for internationally recognised Certified Senior International Wealth Managers (CSIWM) | 3 hours | |