€TRAINING

Seminar: Certified Private Wealth Advisor

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Introduction:

High-net-worth individuals have unique needs that can't be properly addressed by an advisor with a basic financial planning background, The Certified Private Wealth Advisor {CPWA} certification program is an advanced credential created specifically for wealth managers working with high-net-worth clients.

The {CPWA} program focuses on the life cycle of wealth accumulation, preservation, and distribution, professionals are able to identify and analyze the unique challenges high-net-worth individuals face and understand how to develop specific strategies to minimize taxes, monetize and protect assets, maximize growth, and transfer wealth.

Course Objectives:

At the end of this course the participants will be able to:

- Acquiring practical wealth management strategies outside of a theoretical framework that is overloaded with mathematics.
- Knowing how a consultant can extract exponential value that goes beyond just the sum of the portions of a client's wealth.
- Knowing the toolkit needed to compete in the extremely net wealth space.

Targeted Audience:

- Advisors.
- Managers who advise high-net-worth clients.
- Employees who want to gain great skills & knowledge to improve their career.

Course Outlines:

Unit 1: Wealth Management Strategies:

- Tax Strategies and Planning.
- Portfolio Management.
- Risk Management and Asset Protection.

Unit 2: Client Specialization:

- Client Focus "Executives".
- Client Focus "Closely Held Business Owners".
- Client Focus "Retirement".

Unit 3: Legacy Planning:

- Charitable Group.
- Estate Planning and Wealth Transfer.