€TRAINING

Certified Private Wealth Advisor CPWA

30 June - 4 July 2025
Bangkok (Thailand)

Certified Private Wealth Advisor CPWA

REF: T1569 DATE: 30 June - 4 July 2025 Venue: Bangkok (Thailand) - Fee: 6960 Euro

Introduction:

This training program is designed to prepare participants for the certification exam only.

This training program is designed to provide advanced knowledge and skills in private wealth management for high-net-worth individuals. It focuses on developing comprehensive strategies for managing, protecting, and growing wealth, with a strong emphasis on financial planning, tax strategies, and estate planning. It empowers participants to deliver high-value advisory services.

Program Objectives:

By the end of this program, participants will be able to:

- Understand the unique needs of high-net-worth individuals and families.
- Develop and implement comprehensive wealth management strategies.
- Apply advanced tax planning and asset protection techniques.
- Provide estate and legacy planning services that align with client goals.
- Prepare for the CPWA certification exam.

Targeted Audience:

- Wealth Managers.
- Financial Advisors.
- Estate Planning Professionals.
- Tax Consultants.
- Investment Advisors.

Program Outline:

Unit 1:

Understanding High-Net-Worth Clients:

- Defining the unique financial needs of high-net-worth individuals.

- Identifying goals and challenges faced by wealthy clients.
- Developing personalized strategies based on client profiles.
- Balancing short-term and long-term financial goals.
- Techniques for managing complex client situations.

Unit 2:

Advanced Wealth Management Strategies:

- Implementing investment strategies tailored to high-net-worth clients.
- Asset allocation and diversification for wealth preservation and growth.
- Risk management techniques in private wealth.
- Evaluating alternative investments and their role in portfolios.
- Monitoring and adjusting wealth management plans.

Unit 3:

Tax and Asset Protection Strategies:

- Understanding the tax implications for high-net-worth individuals.
- Advanced tax planning techniques to optimize client returns.
- Implementing asset protection strategies to shield wealth.
- Cross-border tax considerations for international clients.

Unit 4:

Estate and Legacy Planning:

- Key principles of estate planning for high-net-worth clients.
- Designing trusts and wills to meet client goals.
- Planning for generational wealth transfer and legacy creation.
- Navigating legal considerations in estate and legacy planning.
- Utilizing philanthropic strategies to align with client values.

Unit 5:

Certification Exam Preparation:

- Comprehensive review of the CPWA exam requirements and format.
- Reviewing key topics and core concepts from the CPWA syllabus.
- Sample Questions and their Potential Answers.
- Resources and materials for further exam preparation.

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