

CWM

Foresight School

What is CWM?

- CWM is Chartered Wealth Manager.
- It is conducted by AAFM India (American Academy of Financial Management).
- It is globally valid course.

Qualification

- Ungraded (for under graduates) – Two Levels
 - (i) Foundation
 - (ii) Advanced
- Graded (for Graduates +3 years experience) – One Level
 - (i) Advanced
- Minimum Qualification 12th pass.

Syllabus

UNIT NO.	NAME OF UNIT
UNIT 1	Real Estate Valuation and Analysis
UNIT 2	Use of Alternative Products in Wealth Management
UNIT 3	Loan & Debt Management
UNIT 4	Equity Analysis
UNIT 5	Portfolio Management Strategies
UNIT 6	Use of Behavioural Finance in Wealth Management
UNIT 7	Relationship Management by a Wealth Manager
UNIT 8	International Taxation and Trust Planning
UNIT 9	Wealth Management Planning
UNIT 10	Advanced Wealth Management

UNIT NO.	NAME OF UNIT
UNIT 1	Overview of Indian and Global Financial System
UNIT 2	Concept of Wealth Management
UNIT 3	Life Cycle Management
UNIT 4	Measuring Investment Returns in Wealth Management
UNIT 5	Investment Vehicles of Wealth Management
UNIT 6	Managing Investment Risk in Wealth Management
UNIT 7	Indian Tax Laws
UNIT 8	Intergenerational Wealth Transfer & Tax Planning
UNIT 9	Role of Wealth Management in Banking
UNIT 10	Legalities in Wealth Management

About CWM

- online exam.
- Passing criteria is 50%.
- There are 1,2,3 and 4 marks questions.
- Foundation :
 - (i) 95 Ques
 - (ii) 100 Marks
 - (iii) 2 Hours
- Advanced :
 - (i) 85 Ques
 - (ii) 160 Marks
 - (iii) 3 Hours
- Exams dates are 1st – 10th and 20th – 30th of every month.

Cost

- Foundation :
 - (i) Regi : 20,000/- + GST
 - (ii) Exam : 3500/-
- Advance :
 - (i) Regi : 20,000/- + GST
 - (ii) Exam : 3500/-
- Coaching : 20,000/- for each level

Timing

(i) Weekdays (Mon, Tues, Thurs, Fri)

Morning : 10.30 am

Afternoon: 3.30 pm

Evening : 7.30 pm

(ii) Weekends

Saturday : 6 pm

Sunday : 11 am