

# Be a Wealth Management Professional

## Wealth Management with The CISI

Become a successful wealth management professional with our first-class learning resources and globally recognised qualifications. By studying our highly-respected qualifications and joining as a member you will gain specialist knowledge and expertise to foster a strong career in wealth and investment management, progressing through the ranks to reach the **Chartered Wealth Manager** title.



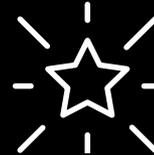
Easy-access online learning



Globally focused content covering key principles



90% of candidates believe our qualifications boost their careers



Complete qualifications and CPD to stand out with designatory letters



Discounts on exams and membership across Africa

## Qualifications

Our world-renowned qualifications are designed by senior practitioners to help you achieve the core competencies for your job. Below are our range of wealth management qualifications:

### International Certificate in Wealth & Investment Management (Level 3)

Suitable for both new entrants, and professionals already in the sector this qualification covers the essentials of financial planning, private client asset management, fund management, advisory functions and investment analysis from a global perspective.

### Certificate in International Advanced Wealth Management (Level 4)

Further develop and enrich your expertise with this higher-level achievement which explores the global markets and builds on the important client-centric skills, and is part of the route to becoming a Chartered Wealth Manager.

### Chartered Wealth Manager Qualification (Level 7)

A postgraduate level achievement which encompasses all the knowledge you need to provide the highest quality service to your clients, and showcases your commitment to your professional career. Upon completion you are able to apply for the Chartered Wealth Manager title.

Our members value their titles which feature on member badges that can be added to email footers, as it *"shows clients that you meet high standards"*

- Peter Kalamatas, PSG Wealth

## Continuous Professional Development

Our extensive library of over 1000 first-class Continuous Professional Development (CPD) resources supports you harnessing #YourCompetitiveEdge. Access videos, online learning modules, and articles online at a time that suits you, providing you multiple opportunities to continue excelling as a professional.

Automatically logged CPD – to save you time

Compatible with many devices, easy access learning

Continually updated and added to, keeping you in touch with the market

## Online learning modules (Professional Refresher)

Exercise your brain and further your knowledge with our range of 200+ interactive online learning modules, here are a few topics:



ANTI-MONEY LAUNDERING



CRYPTOCURRENCIES



ETHICAL & SUSTAINABLE INVESTMENT



INTEGRITY & ETHICS

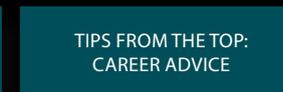
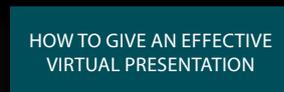
## On-demand videos (CISI TV)

We have a library of 500+ on-demand videos that can be watched on computers, tablets, and smartphones. Videos include:



## Exclusive member magazine, *The Review*

Our quarterly magazine is continuously added to and keeps members up to date with a wide range of topical articles including technical, soft skill and career progressions content, such as:



## Events

You will be able to attend events that provide a comprehensive coverage of key issues in financial markets globally. Visit **cisi.org/events** to browse our upcoming events, and below are some of our key events, along with a couple of our networks and forums which you can join for up-to-date technical, soft skill or career progression content:



## Short online courses (Professional Assessments)

We offer short online assessments with certificates upon completion on important sector topics to support you in your role by staying in tune with the market.



### Sustainable and Responsible Investment

Designed to help practitioners in advisory roles to understand clearly the sustainable and responsible investment landscape and key issues, so that they can select the best products for their clients.

## Career Progression

Our wealth management offering encourages a long-lasting career with many opportunities for progression and access to designatory letters showcasing your professionalism. Commit to excellence by achieving qualifications and consistently completing CPD to climb up the ranks and reach the pinnacle of your career as a **Chartered Wealth Manager**.



To achieve this title you will need to reach the membership levels of either Chartered Member or Chartered Fellow through a combination of consistent completion of CPD and qualifications, have completed a year of CPD, and you must hold the Chartered Wealth Manager qualification.

Reach the pinnacle of your career by achieving a new qualification and joining as a member

## Contact Us

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#cisiafrica