Certified International Wealth Manager (CIWM)

Final Examination Syllabus

Wealth Management

1 Basic concepts

1.1 Comparing outcomes of investments

1.2 Utility functions and indifference curves

1.3 Expected utility approach

1.4 Expected utility and the mean-variance framework

2 Asset and liabilities categories

2.1 Assets and funds

2.2 Alternative assets

2.3 Structured products

2.4 Liabilities

3 Clients profiles

3.1 Setting return objectives

3.2 Time horizon

3.3 Liquidity need

3.4 Taxes

3.5 Keep the profile alive

4 The financial plan: Assessing the client's assets and liabilities

4.1 Pro forma financial statements

4.2 Base currency

4.3 Assets

4.4 Liabilities

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Relationship Management

Real Estate Valuation and Analysis

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Behavioural Finance

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