

CISI

CHARTERED INSTITUTE FOR
SECURITIES & INVESTMENT

INTERNATIONAL CERTIFICATE IN WEALTH AND INVESTMENT MANAGEMENT (ICWIM)

ICWIM is a bespoke
qualification aimed at
wealth and investments



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INTRODUCTION KAPILA DODAMGODA

Founder/Managing Director - Academy of Finance
Regional Director – ICMA Australia (Sri Lanka)
Director – NERD Centre
Former Finance Director of MAS Investments

MA Economics
FCMA, CGMA
Fellow CMA(Australia)
B Sc Engineering, AMIESL
MCIM













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Our Agenda

- Introduction - Academy of Finance & CISI
- Wealth and Investment Management Certification
- Learning content of the programme
- Assessment mechanism
- Financial commitment
- Get to know - Lead module facilitator
- Get to know - Academy of Finance staff
- Get to know – Class
- Your learning package and the way forward











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Academy of Finance

Founded twelve years ago with the vision of

- Training and enriching non-finance professionals to become finance savvy and,
- Providing development opportunities and higher qualifications for finance professionals.








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What is CISI?


Chartered Institute of Securities & Investments

- The CISI is the largest and most widely respected professional body for the securities and investment profession in the UK and financial centres globally.
- Formed in 1992 by London Stock Exchange. practitioners, CISI has a global community of 45,000 members in over 100 countries.



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*it's not about
How much
you make
but rather
How much
you don't lose.*



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for Stock Brokers
Stockbrokers need to know a bit more than just making recommendations to bring in more investors and keep them engaged.

Only 500,000 Sri Lankans have CDS accounts & **less than 10%** of them are actively engaged in the market. Learn how to be among the 10%.

Candidates upon completion are eligible use **ACSI** designatory letters and progress to higher level qualifications.

JOIN THE NEXT INTAKE **OCTOBER** **VIRTUAL CLASSES AVAILABLE** 0772 840 850- Yameera, yameera@academy.lk

*A banker is a fellow
who lends you his umbrella
when the sun is shining,
but wants it back the minute
it begins to rain.*



Become a better
BANKER by becoming
a better **WEALTH
CREATOR**

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for Bankers
Creates the right platform to build lasting business partnership.

Bankers will hold hand with *entrepreneurs* from the start up stage through nurturing the growth, business turbulence and sailing rough seas, in the process of creating wealth.

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Selling life insurances is **CHALLENGING?**

That's because the product has to compete against all other attractive investment opportunities

Learn how to be a better **Investment Advisor**



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for **Wealth Planners
& Insurance
Advisors**

Less than 15% Sri Lankans have life insurance policies whereas in USA it is as high as 60%.
Learn how to understand the client and the product beyond insurance..

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I will tell you how to **Become RICH!**
— close the doors —

Be **Fearful**
when others are Greedy

Be **GREEDY**
when others are Fearful.



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for **Investors**
(both beginners or professionals)
already investing or planning to
invest in the shares and other
investment products.

Comprehensive insight to investing and investments to choose your investment strategy based on personal life status, risk appetite and cashflow requirements.

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What is ICWIM?


International Certificate in Wealth & Investment Management

- ICWIM is a bespoke qualification aimed at wealth and investment practitioners and others dealing with high net worth clients.
- It is also for serious investors wanting to make informed, sensible investments in the right mix of assets the high net worth individuals.





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Whom the Qualification is for?

- Insurance industry professionals
- Investment advisors and Wealth planners
- Stock brokers
- Professional Bankers and finance service sector
- Individual investors and high net worth individuals for life time financial planning



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What you will learn?

- **The Financial Services Industry** - Different institutions and players operating in the financial services sector, including the forex market and how financial markets operate.



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What you will learn?

- Asset Classes** - Investing in different types of assets including cash, money market instruments, bonds & fixed income assets, shares, warrants & rights, derivatives, retirement plans and commodities.















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What you will learn?

- Collective Investments** - Investment funds, units trusts, hedge funds, private equity and sukuk funds.















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What you will learn?

- Fiduciary duties, advising clients based on the specific client needs, investment objectives and formulating a strategy and tax implications of investments.


















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


What you will learn?

- Basic economics and finance theory, financial mathematics, statistics & technical analysis and valuation required to better understanding of the market dynamics and investments.






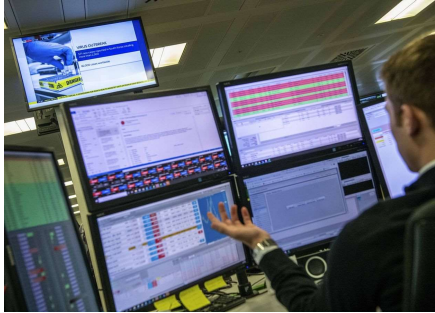
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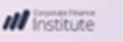


What you will learn?

- Creating an investment portfolio, investment strategies, the role of asset classes and funds in a portfolio, risk & return and portfolio performance measurement.





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What you will learn?

- **Lifetime financial provision** – planning for retirement, protection planning, estate planning, trusts and foundations












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What you will learn?

- **Industry regulation** - Financial services regulation, financial crime & money laundering, corporate governance and ethical standard

















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



What is the assessment mechanism?

The assessment is a computer based examination

- Two-hour paper
- 100 multiple-choice questions
- Pass mark of 70%



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How much does it cost?

- Local Tuition Fee

Local Participants Rs 35,000

Foreign Participants US \$ 200

CISI Fee – Exam sitting in Sri Lanka

- Registration Fee £ 35

- Examination Fee £ 125

(Could vary depending on the country)



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Lead Facilitator



Usama Jiffry

CFA, ACMA, CGMA, SCAV (Stern, NY)

Corporate Finance, Investment Banking
and Capital Markets

- Over 12 years of combined corporate experience in financial advisory/management and capital markets advisory.
- Experience in Financial Advisory Services with one of the big four audit firms specializing in corporate finance, transaction services and M&A advisory.
- Currently engaged as Manager for a leading stock brokering firm where he is involved with research with respect to listed entities in Sri Lanka and handles an additional role as a Senior Advisor for the investment banking outsourcing activities carried out for clients in Asia and the Middle East.



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Lead Facilitator



Usama Jiffry

CFA, ACMA, CGMA, SCAV (Stern, NY)
Corporate Finance, Investment Banking
and Capital Markets

Lecturer for over a decade specializing in areas of risk management, financial management and business strategy for the subjects in the;

- Chartered Financial Analyst (CFA-USA)
- University of the West of Scotland degree (UWS)
- Chartered Institute of Management Accountants (CIMA-UK)
- Association of Chartered Certified Accountants (ACCA-UK) programs.

Visiting lecturer at the University of Colombo for modules of financial modelling and contemporary accounting.

Lecturing experience includes experience spanning across Sri Lanka, India and Bangladesh.

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Your Class Associates

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Team Academy




Pavithra




Yameera



Nipunika











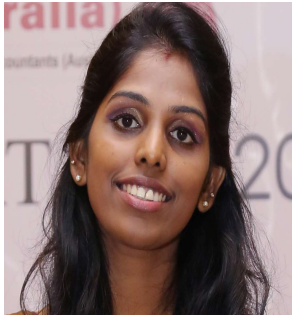

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
Team Academy



Himali



Shivaanthi

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Academy of Finance Virtual Package

- CISI Official Text (Upon registration)
- Virtual classes (50 hours of live, interactive classes)
- Access to the recordings of Virtual Classes
- Lecturer's presentations & additional material
- Group discussions through the e-learning portal
- Revision Portal with more than 1,000 questions
- Three mock examinations on the Revision Portal
- Additional one on one online tutor support - *Premium

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CISI Supporters..

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What is the next step?

Those who are already registered

- Complete the academy of finance registration form
- Collect your study package
- Get access to the Academy e-learning portal
- Start the journey !

Those who are planning to register

- Please get in touch with your contact person for registration



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Thank You!



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