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INTERNATIONAL CERTIFICATE IN  
WEALTH & INVESTMENT  
MANAGEMENT (ICWIM)


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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
- Code of conduct
- Get to know - Lead module facilitator
- Get to know - Academy of Finance staff
- Get to know – Class
- Way forward



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SRI LANKA

CISI is completing 10 years in Sri Lanka





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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.
- CISI has a global community of 45,000 members in over 100 countries.





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**Founded twelve years ago with the vision of;**

Empowering the next generation professional  
with financial wisdom

**Mission**

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



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10

YEARS



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## What is International Certificate in Wealth & Investment Management?

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

Eligible to use ACSI designation




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## Who Should Study?

- Professionals in banking, financial services and insurance related industries.
- Wealth managers, stock-brokers, investment advisors and planners.
- Individual investors and high net worth individuals for lifetime 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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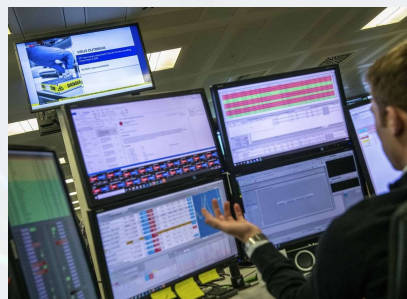
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## What you will learn?

- 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

### 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  
Rs 37,500
- CISI Registration Fee  
£ 35
- CISI Examination Fee  
£ 125





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Completion time

5

Months


20

## Academy of Finance Study Package

- CIS Official Text
- Virtual Classes – Minimum 50 hours
- Access to Recorded Sessions
- Question a Day
- Mini Quizzes from the beginning
- Revision Portal with Topic-wise Quizzes
- Three Mock Examinations at the end

**Class Timing Tuesdays - 7.00 pm to 9.30 pm**



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## Lead Facilitator



Usama Jiffry

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

- Over twelve 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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## Get to Know – Academy Staff



**Yameera**



**Pavithra**



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## Get to Know – Academy Staff



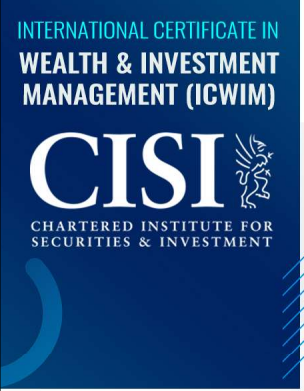

Nipunika



Himali



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## Code of conduct during sessions

### Expected from the participants

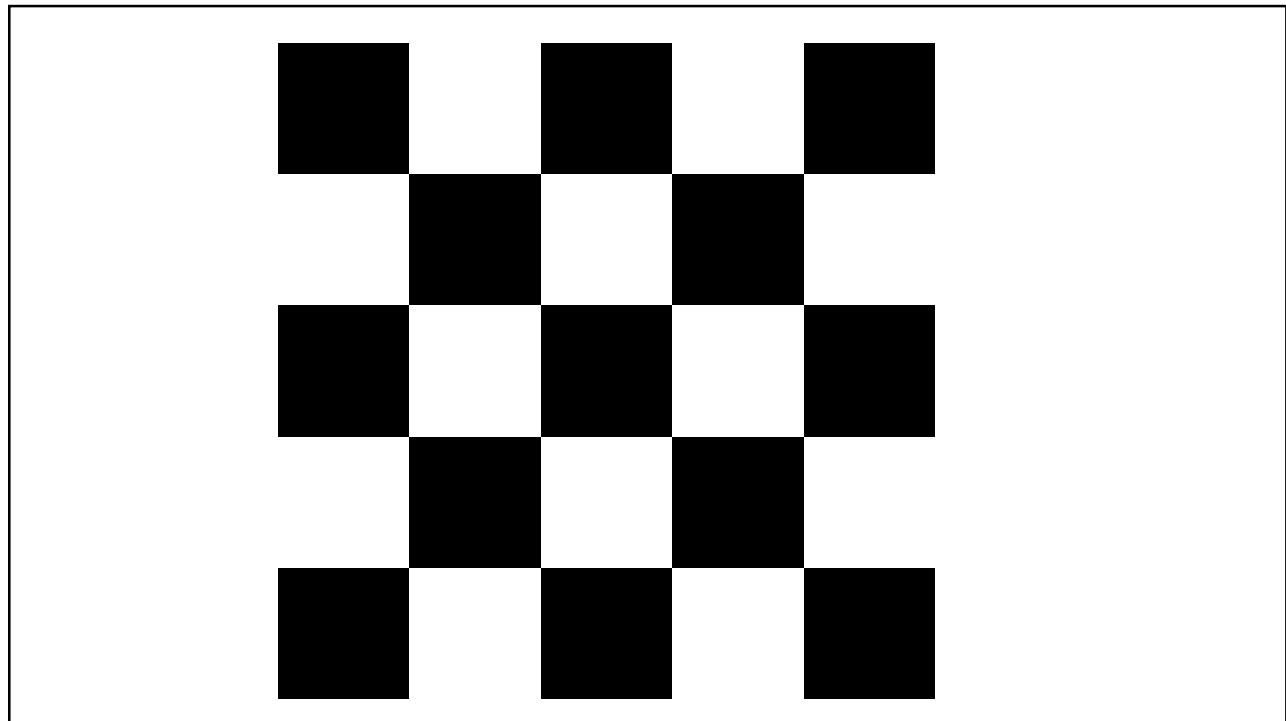
- Join the session on time and be present throughout
- Be present with the video on
- Free to question, seek clarifications and discuss

### Academy of Finance Certificate

- Minimum attendance of 75%
- Participation in all three Mock Examinations
- Minimum 50% marks for the Mock Examinations



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## Get to Know Your Class



- Your Name,
- Place of Work
- Designation



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**NDB**

**HSBC**

**London Stock Exchange Group**

**DFCC BANK**

**HNB**

**SLASSCOM**  
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**virtusa**  
Accelerating Business Outcomes

**COMMERCIAL BANK**

**MillenniumIT**  
LSEG technology

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**Questions and Answers**

**Q&A**

*You have Questions*

*We have Answers*

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## What is the next step?

If you are already registered interested  
**Get access to the learning portal**

If you are interested  
**Contact us for registration**






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**FREE WEBINAR**  
 **zoom session**

**23<sup>rd</sup> June**  
**06.30 PM**

### Fundamental Analysis in Making the Right Investment Decision

**AREAS COVERED**



- The stock market performance during the recent past
- Sectoral performance in 2020 Q4 and 2021 Q1
- The most actively traded listed companies and sectors
- Factors to consider before an equity investment
- Stock analysis based on multiples & price movements
- SL Economic Outlook

**More info**  
0772 840 850

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USING THE LINK

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Manager Research  
~Softlogic Stockbrokers

**Q&A SESSION**  
  
**Eardley Kern**  
(CMA Australia, MBA, ABF)  
Head of Sales  
~Softlogic Stockbrokers

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## What is the next step?



**THE JOURNEY BEGINS**





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## THANK YOU !!!



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