

**CISI**  
CHARTERED INSTITUTE FOR  
SECURITIES & INVESTMENT

**INTERNATIONAL CERTIFICATE IN  
WEALTH & INVESTMENT  
MANAGEMENT (ICWIM)**

**ACADEMY  
OF FINANCE**  
The Gurus of Financial Wisdom

**BESPOKE QUALIFICATION FOR INVESTMENT PROFESSIONALS AND INDIVIDUAL INVESTORS**

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**GLOBAL CENTERS FOR CREATING WEALTH - NEW YORK**  
New York City, with the two largest stock exchanges in the world, is considered the financial capital of the world. The city plays host to some of the largest and finest companies, biggest banks, and industries that create billions of dollars in wealth.

**WHO SHOULD ATTEND?**  
Professional Bankers  
Investment Advisors and Stockbrokers  
Insurance Professionals and Wealth Planners  
Individual Investors & Entrepreneurs

**ICWIM (UK)** is a state-of-the-art qualification on wealth and investment management, which covers the essentials of financial services industry, private client asset management, investment analysis and fund management, assets classes, industry relationship and lifetime financial planning.

Candidates upon completion are eligible to use **ACSI** designation

More info: 0772 840 850  
ymwera@academy.uk

**GLOBAL CENTERS FOR CREATING WEALTH - LONDON**  
London is the world's most international and connected financial centre, providing unrivalled access to global markets. It is a magnet for workers from around the world, who make up a diverse pool of specialists, with deep human linkages to virtually every economy globally. CISI was born through London Stock Exchange.

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**GLOBAL CENTERS FOR CREATING WEALTH - SINGAPORE**  
Singapore is the fourth largest financial centre in the world and the top logistics hub, possessing the world's 10th largest foreign reserve. Singapore's attractiveness lies in its transparent and sound legal framework complementing its economic and political stability.

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**GLOBAL CENTERS FOR CREATING WEALTH - HONG KONG**  
Located at the heart of Asia, Hong Kong thrives on financial integration with Mainland China, extensive networks with the rest of the world, sound legal system, free flow of capital, a full range of financial products and a large pool of financial talent.

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Also see next slides SEPTEMBER  
Qualifies 5 Months

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## 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 – Colleagues in the class
- Way forward

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## What is CISI?

### Chartered Institute of Securities and Investments (CISI)

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

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**CISI is completing 13 years in Sri Lanka**



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**Tracy Vergo OBE** – Chief Executive Officer CISI  
**Asanka Wijeratne** – Country Head for Sri Lanka  
**Kapila Dodamgoda** – Founder/Managing Director of Academy of Finance

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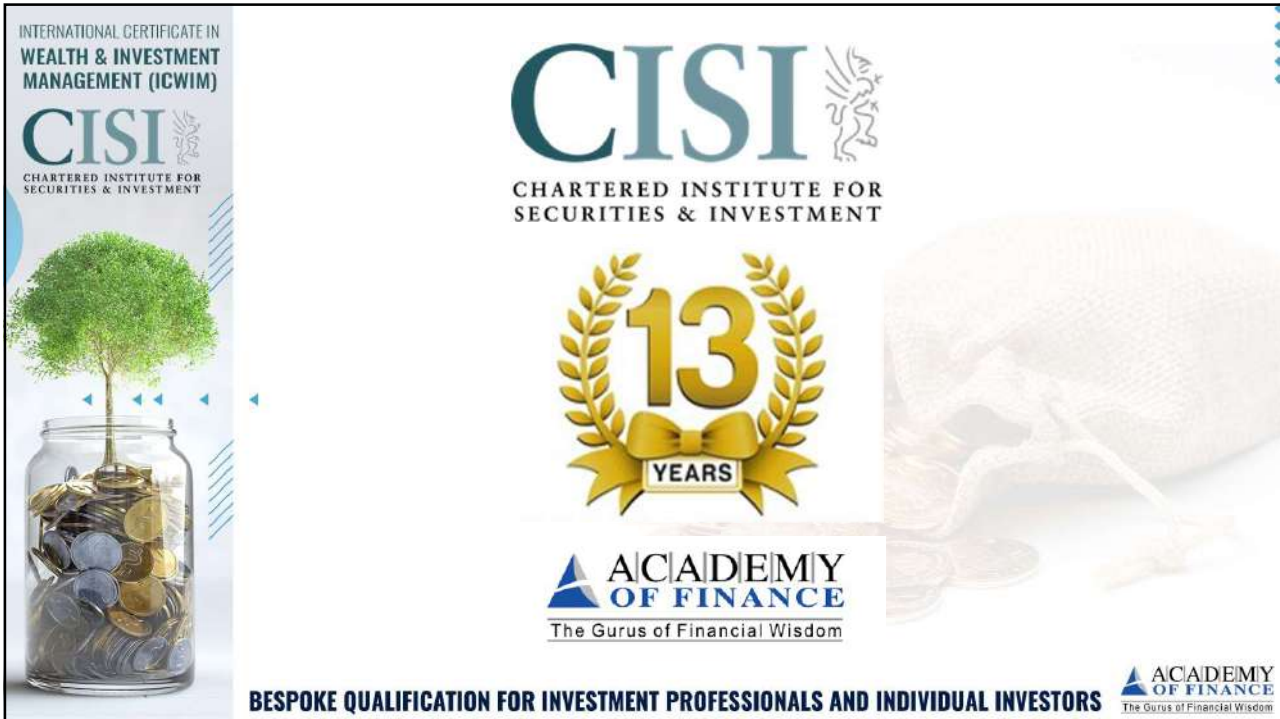



**Asanka Wijeratne**  
*Chartered MCSI*  
**Country Head – Sri Lanka**  
**Chartered Institute for Securities & Investment**

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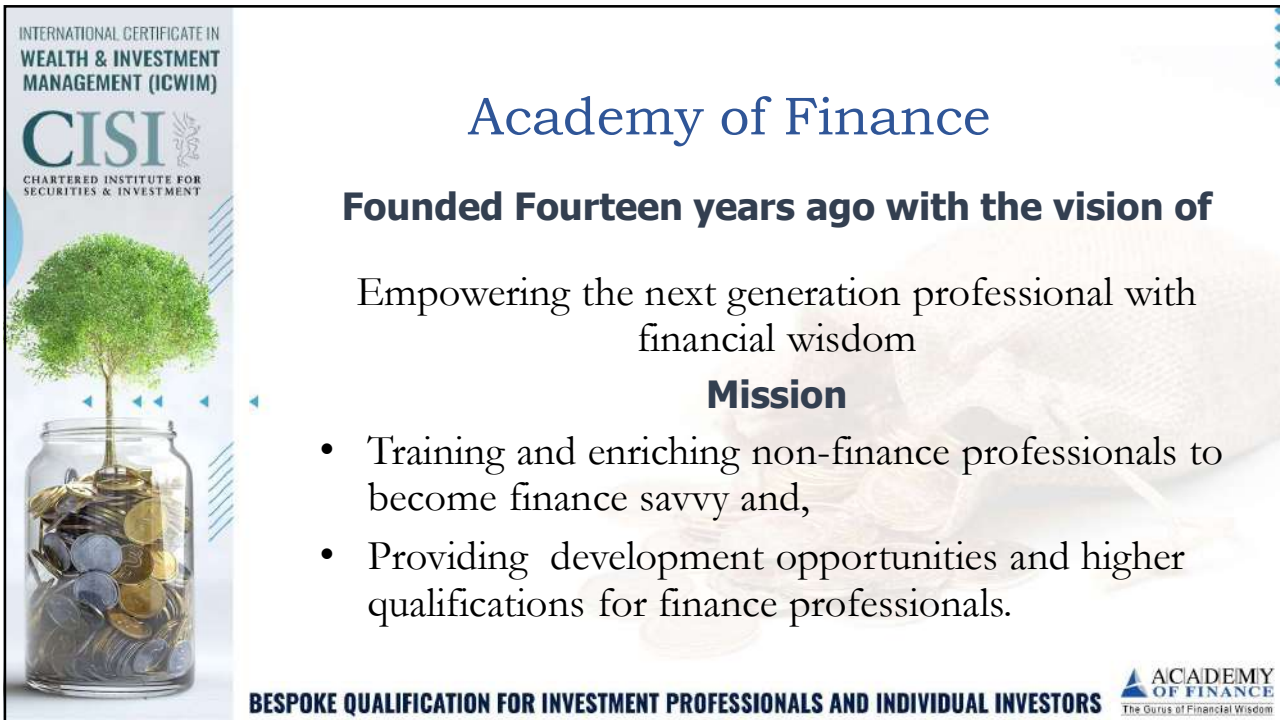
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YEARS

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## Academy of Finance

**Founded Fourteen 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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## Introduction – Kapila Dodamgoda

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

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



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## 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 and the high-net-worth individuals.

Eligible to use ACSI designation


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## Whom the Qualification is for?

- Professional bankers & relationship managers
- Financial service sector professionals
- Insurance industry professionals
- Investment advisors and wealth planners
- Stockbrokers
- Individual investors, entrepreneurs
- High net worth individuals

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## What will you learn?

- **The Financial Services Sector**  
Different institutions and players operating in the financial services sector, including the forex market and the operation of financial markets.



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## What will you learn?

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



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## What will you learn?

- **Asset Classes & Financial Markets**  
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 will you learn?

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




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## What will you learn?

- **Economics and Investment Analysis**  
Basic economics and finance theory, financial mathematics, statistics & technical analysis and valuation required to better understand the market dynamics and investments.




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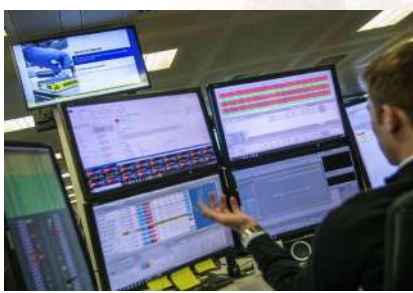
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## What will you learn?

- Investment Management**  
 Investment strategies, the role of asset classes and funds in a portfolio, risk & return and portfolio performance measurement.



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## What will you learn?

- Investment Advise**  
 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 will you learn?

- **Lifetime financial position**  
Planning for retirement, protection planning, estate planning, trusts and foundations





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**CISI** PATHWAYS TO A GLOBAL JOURNEY WITH CISI  
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Combination of the CISI modules will make you eligible for a practicing license under the UAE Securities & Commodities Authority Licensing Regime (SCA).

- Financial Analyst
- Risk Management Officer
- Internal Controller
- Investment Manager/Chief
- Clearing Officer
- Compliance Officer
- Promoter
- Trading/Operations Manager
- Anti-Money Laundering Officer

Similar opportunities are available in several other GCC countries

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Academy of Finance will be commencing programmes in October.

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


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## Practicing License – UAE SCA

**UAE Securities and Commodities Authority  
Qualifications- Led Licensing Regime**

Job Function	Exams Required for SCA Licence	Continuous Professional Development		
Director/ Head of Category	UAE Financial Rules and Regulations			
Chief Compliance Officer	UAE Financial Rules and Regulations	Combating Financial Crime	Introduction to Securities & Investment (International)	Global Financial Compliance
Chief Risk Management Officer	UAE Financial Rules and Regulations	Risk in Financial Services	Introduction to Securities & Investment (International)	Operational Risk
Head of Compliance	UAE Financial Rules and Regulations	Combating Financial Crime		Global Financial Compliance
Head of Risk Management	UAE Financial Rules and Regulations	Risk in Financial Services	Combating Financial Crime	Derivatives
Operation Manager	UAE Financial Rules and Regulations	Global Securities Operation	Introduction to Securities & Investment (International)	Operational Risk
Investment Operation Manager	UAE Financial Rules and Regulations	Global Securities Operation	Introduction to Securities & Investment (International)	Risk in Financial Services
Trading Manager	UAE Financial Rules and Regulations	Fundamentals Of Financial Services	Derivatives	
Broker Representative	UAE Financial Rules and Regulations	Fundamentals Of Financial Services		

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## Practicing License – UAE SCA

**UAE Securities and Commodities Authority  
Qualifications- Led Licensing Regime**

Job Function	Exams Required for SCA Licence	Continuous Professional Development		
Financial Advisor (IPO)	UAE Financial Rules and Regulations	Corporate Finance Technical Foundation		Risk in Financial Services
Financial Analyst/ Chief Financial Analysts (Capital Market)	UAE Financial Rules and Regulations	International Certificate in Wealth and Investment Management (Level 3)		Risk in Financial Services → Derivatives
Fund Investment Manager/ Portfolio Manager	UAE Financial Rules and Regulations	International Certificate in Wealth and Investment Management (Level 3)		Risk in Financial Services → Wealth Management Practice
Promotion Manager	UAE Financial Rules and Regulations	International Certificate in Wealth and Investment Management (Level 3)	Introduction to Securities & Investment (International)	Risk in Financial Services
Chief Technology Officer (CTO)	UAE Financial Rules and Regulations	IT in Investment Operation	Introduction to Securities & Investment (International)	
Internal Auditor	UAE Financial Rules and Regulations	Operational Risk	Introduction to Securities & Investment (International)	
Credit Rating Analyst/ Head of Credit Rating Analyst	UAE Financial Rules and Regulations	Risk in Financial Services		Corporate Finance Technical Foundations

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## What is the assessment mechanism?

### Computer based examination

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




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## How much should you pay CISI?

- CISI Registration Fee  
£ 40-25
- CISI Examination Fee  
£ 125-103


Completion time 5 Months



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## Academy of Finance Study Package

- CISI official text
- Virtual classes – minimum 50 hours
- Access to recorded sessions
- Mini quizzes
- Revision portal with topic-wise quizzes
- Three mock examinations at the end

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

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## Lead Facilitator



- Capital Market Specialist with nearly 15 years of experience across Investment Banking, Equity Research, and Corporate Finance.
- Currently working as Senior Vice President – Investment Banking in a leading Investment Bank in Sri Lanka.
- Hands on Experience in Mergers and Acquisitions, Capital Raising, Corporate Restructuring.
- More than 10 years of experience in Lecturing across Advance Financial Management and Financial Management of ACCA (UK) , B. Sc, and MBA Programs

**K. Pasindu Sampath Perera**  
*FCMA(UK), CGMA, MCIM(UK),  
ACMA(SL), B.Sc(sp)*  
Vice President – Investment Banking  
Asia Securities Advisors (Pvt) Limited

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## Lead Facilitator




- B.Sc. Management Special from the University of Sri Jayewardenepura
- Chartered Global Management Accountant
- Member of Chartered Institute of Marketing
- Fellow Member of Chartered Institute of Management Accountants UK
- Associate Member of Certified Management Accountants, Sri Lanka.

**K. Pasindu Sampath Perera**  
*FCMA(UK), CGMA, MCIM(UK),  
 ACMA(SL), B.Sc (Sp)*  
 Vice President – Investment Banking  
 Asia Securities Advisors (Pvt) Limited




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## Get to know Academy Staff




**Pavithra**



**Yameera**



**Chapa**




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## Get to know Academy Staff



**Himali**      **Kateland**


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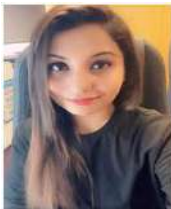
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## Get to know Academy Staff



**Akshari**      **Rumaiza**

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## Get to know Academy Staff



**Madhavi**




**Renuka**

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## Code of Conduct

### Expected from the participants

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


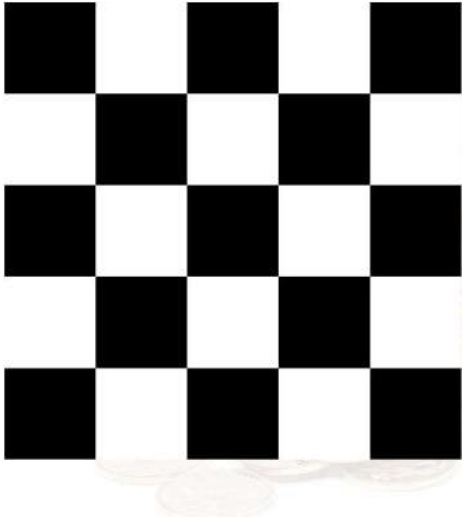
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## Academy of Finance Certificate

- 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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## CISI Supporters





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## Questions and Answers



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## What is the Next Step

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



**If you are interested, not yet registered**  
Contact us for registration



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**THANK YOU**

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