



**CISI**  
CHARTERED INSTITUTE FOR  
SECURITIES & INVESTMENT

**ACCREDITED  
TRAINING  
PARTNER**  
2023-24

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

**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 gives host to some of the largest and finest companies, biggest banks, and industries that create billions of dollars in wealth.



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

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

ICWIM (UK) is a state-of-the-art qualification in wealth and investment management, which covers the essentials of financial services industry, portfolio asset management, investment analysis and fund management, assets classes, risk/return relationship and effective financial planning.

Candidates upon completion are eligible to use ACIS designation.

More info: 0772 840 850 | [info@academyoffinance.co.uk](mailto:info@academyoffinance.co.uk)

Don't miss out on SEPTEMBER 2024 | [www.academyoffinance.co.uk](https://www.academyoffinance.co.uk)

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

**GLOBAL CENTERS FOR CREATING WEALTH - LONDON**

London is the world's most international and connected financial centre, providing unparalleled 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 capital, to virtually every sector globally. CISI was born through London Stock Exchange.



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**GLOBAL CENTERS FOR CREATING WEALTH - SINGAPORE**

Singapore is the fourth largest financial center in the world and the top financial hub, possessing the world's 22nd largest foreign reserves. Singapore's attractiveness lies in its transparent and social trust 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 network 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 talents.



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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 – The facilitators
- 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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ACM Quantum Leap ACU ACADEMY OF FINANCE CMA (Australia) International Internal Auditors CISI

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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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**Mr. Jhon Preston**  
Chief Operating Officer of CISI

**Mr. Kevin Moore**  
Executive Director CISI



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**Ms Tracy Vergo OBE**, the CEO of the Chartered Institute for Securities & Investments  
Who joined us at the CMA ANZ qualifying programme.



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










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## Academy of Finance

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

ICWIM (UK) is a state-of-the-art qualification on wealth and investment management, which covers the essentials of financial services industry, asset classes and financial markets, portfolio management, investment advice & management, lifetime financial planning.

Combination of the CISI modules will make you eligible for a practicing license under the UAE Securities & Commodities Authority Licensing Regime (SCA). Candidates upon completion are eligible to use **ACSI** designation

More info: 077 710 2449 | cma.australia@academy.lk | JOIN THE NEXT INTAKE MARCH | Duration : 5 Months | ACADEMY OF FINANCE | The Guru of Financial Wisdom

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**Risk in Financial Services**  
 The Essential Qualification for Tomorrow's Risk Practitioner

Who should study?  
 Risk teams & finance officers  
 Compliance teams  
 Branch management  
 Corporate Lawyers  
 Senior managers of all disciplines  
 Existing & aspiring non-executive directors

Enroll Today  
 Transform your career with Special Discount of 35 USD fee

Completed candidates can become **CISI Associate Members** and use the **ACSI** designation.

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

DURATION - 5 MONTHS | NEXT INTAKE OCTOBER

ACADEMY OF FINANCE | The Guru of Financial Wisdom



**GLOBAL FINANCIAL COMPLIANCE**  
 YOUR PATHWAY TO A GLOBAL JOURNEY

**FREE INDUCTION** 08<sup>th</sup> April from 3:00 pm to 5:30 pm

DURATION : 5 MONTHS  
 JOIN THE NEXT INTAKE

**Key Features**  
 Specialist qualification covering key aspects of compliance  
 Globally portable and addresses international issues reflecting the needs of worldwide markets

**Who should Study**  
 Suitable for all compliance staff  
 Especially relevant for Compliance Officers

**WORLD WIDE**  
 2300+ classes  
 Online exams

Combination of the CISI modules will make you eligible for a practicing license under the UAE Securities & Commodities Authority Licensing Regime (SCA). Candidates upon completion are eligible to use **ACSI** designatory letters and progress to higher levels.

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## Introduction – Kapila Dodamgoda

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

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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## 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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## PATHWAYS TO A GLOBAL JOURNEY WITH CISI

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



INTERNATIONAL CERTIFICATE IN WEALTH AND INVESTMENT MANAGEMENT (ICWIM)

ICWIM is the pathway to CHARTERED WEALTH MANAGER QUALIFICATION

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



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yameera@academy.ik

WORLDWIDE SPECIALIST CLASSES

ONLINE EXAMS

DURATION : 5 MONTHS

JOIN THE NEXT INTAKE MARCH











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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 Analyst (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 5)	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
- CISI Examination Fee  
    £ 120  
    **Sri Lanka price**



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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INTERNATIONAL CERTIFICATE IN WEALTH & INVESTMENT MANAGEMENT (ICWIM-UK)

## Facilitator



**Usama Jiffry**  
*CFA, MBA, ACMA (UK), CGMA, SCAV*  
*(Stern, NYU)*

**Associate Vice President – Investment Banking**  
**Asia Securities Advisors (Pvt) Ltd**

Experience professional in Financial Advisory, Investment Banking and Capital.

A CFA Charter holder, an Associate member of CIMA (UK) and a member of CGMA, accredited in Advanced Valuations from the University of New York - Leonard. N. Stern School of Business.

Trainer/Lecturer specializing in Risk Management, Internal Control, Governance, Financial Risk Management, Financial Analysis, Corporate Valuations and Financial Modeling.









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## Facilitator



**Usama Jiffry**  
*CFA, MBA, ACMA (UK), CGMA, SCAV (Stern, NYU)*  
Associate Vice President – Investment Banking  
Asia Securities Advisors (Pvt) Ltd

Specialized areas of expertise include Corporate Finance, M&A Advisory, Corporate Valuations, Transaction Services, Equity Research, Portfolio Advisory, Financial Planning & Analysis, Finance Transformation and Financial Modeling. Further areas of interest include Risk Management, Restructuring, FinTech and Industry Analysis.









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## Facilitator



**Nishantha Jayaweera**  
*CFA, FRM*  
Deputy Director, Risk Management Department  
CENTRAL BANK OF SRI LANKA (CBSL)

Specialized in portfolio management, liquidity management, foreign exchange and financial risk management with over 17 years of experience at the Central Bank of Sri Lanka. Almost a decade experience in investing in US Treasuries, international money markets and foreign exchange trading while managing the liquidity of the foreign exchange reserves.

Well-trained in portfolio and liquidity management, foreign exchange trading, hedging interest rate risk and foreign exchange risk, and overall financial risk management through the training programs conducted by international organizations such as the International Monetary Fund (IMF), Bank for International Settlement (BIS), and major central banks such as Federal Reserve Bank New York.









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## Facilitator



**Nishantha Jayaweera**  
*CFA, FRM*  
**Deputy Director, Risk Management Department**  
**CENTRAL BANK OF SRI LANKA (CBSL)**

As the project leader, successfully completed the project on the Implementation of the Treasury Management System for the Central Bank of Sri Lanka. Currently leading the financial risk management team of the Central Bank of Sri Lanka designated as the Deputy Director of the Risk Management Department.












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## Get to know Academy Staff










**Pavithra**



**Yameera**






**Chapa**

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## Get to know Academy Staff



**Himali**      **Kateland**      **Upeksha**



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**Harshani**      **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




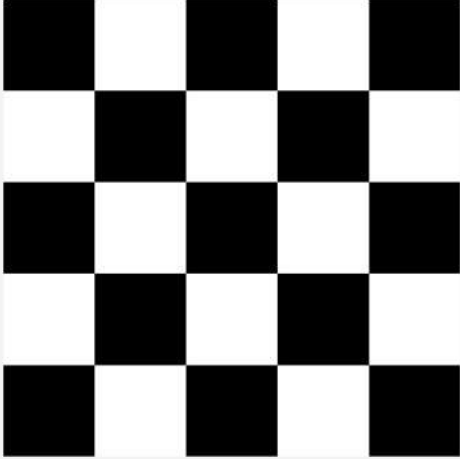
















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## Academy of Finance Certificate

- 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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**THE JOURNEY BEGINS**

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**Thank you!**

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