



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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**INTERNATIONAL CERTIFICATE IN
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Is it really difficult to sell Investment Plans?

Because you need to compete with other attractive investments

CISI
CHARTERED INSTITUTE FOR
SECURITIES & INVESTMENT

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

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

for WEALTH PLANNERS AND INVESTMENT ADVISORS

Learn to see the client perspective, understand the options and guide to create a life plan instead of selling a policy.

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

JOIN THE NEXT INTAKE **JUNE** **AVAILABLE**

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

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

for Stock Brokers

Stockbrokers need to know just more than just making recommendations to bring in more investors and keep them engaged.

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

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

JOIN THE NEXT INTAKE **OCTOBER** **AVAILABLE**

I will tell you how to Become RICH — close the doors — Be Fearful when others are Greedy & GREEDY when others are Fearful.

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**INTERNATIONAL CERTIFICATE IN
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for Investors

Only beginners or professionals already investing or planning to invest in the share 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.

JOIN THE NEXT INTAKE **OCTOBER** **AVAILABLE**

HOW TO BE A RELATIONSHIP MANAGER WITH A DIFFERENCE?

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

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

for BANKERS

Relationship Managers, Branch Managers and deposit mobilising teams.



Bankers' financial needs differ during the scoring, when nurturing growth and sailing through the difficult times. Learn to offer the right product at the right time.

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

JOIN THE NEXT INTAKE **JUNE** **AVAILABLE**

ACM **Association of Banks in Sri Lanka** **ACU** **Association of Chartered Accountants** **ACADEMY OF FINANCE** **The Gurus of Financial Wisdom** **CMA (Australia)** **Chartered Accountants** **CISI**








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

Agenda

- Introduction - Academy of Finance & CISI
- Wealth and Investment Management Certification
- Learning content of the program
- 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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INTERNATIONAL CERTIFICATE IN WEALTH & INVESTMENT MANAGEMENT (ICWIM-UK)

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 the London Stock Exchange for practitioners, CISI has a global community of 45,000 members in over 100 countries.

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MANAGEMENT (ICWIM-UK)

CISI is completing 14 years in Sri Lanka











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



Tracy Vergo OBE
Chief Executive Officer CISI

Michael Fernandopulle
Country Head for Sri Lanka

Kapila Dodamgoda
Founder/Managing Director
The Academy of Finance

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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

FREE ONLINE
 **zoom session**
24TH OF APRIL

INDUCTION & FIRST LECTURES
FROM 7.00 PM ONWARDS

WORLD WIDE
2000+ classes
Online exams

More info: +94772 840 850
yameera@academy.jk

JOIN THE NEXT INTAKE **APRIL**
Duration: 5 Months









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RISK IN FINANCIAL SERVICES
THE ESSENTIAL QUALIFICATION FOR TOMORROW'S RISK PRACTITIONER

DURATION : 5 MONTHS

Risk in Financial Services qualification is a comprehensive global introduction to major risk areas in financial services.

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

WHO SHOULD STUDY?
Risk teams
Finance officers
Compliance teams
Branch management
Corporate lawyers
Existing & aspiring non-executive directors

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

ACADEMY OF FINANCE
The Source of Financial Wisdom

MORE INFO → 94 77710 2449

WORLD WIDE 2000+ classes Online exams

GLOBAL FINANCIAL COMPLIANCE
YOUR PATHWAY TO A GLOBAL JOURNEY

FREE INDUCTION 08th April from 8:00 pm to 9:30 pm

DURATION : 5 MONTHS
JOIN THE NEXT INTAKE

Key Features
Specialized qualifications 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

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

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+94 772 840 850
jagmeena@academyoffinance.com

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

Starting in May 2025

ACM **Association of Accountants & Finance** **AQU** **ACADEMY OF FINANCE** **CMA (Australia)** **International Auditors** **CISI**

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CISI ACCREDITED TRAINING PARTNER

Introduction – Kapila Dodamgoda

Founder/Managing Director - Academy of Finance
Regional Director – ICMA Australia (Sri Lanka)
Director – Vallibel Finance
Former Director – National Engineering Research and Development Centre (NERD)

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

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

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ACM **Quantum Leap** **ACU** **ACADEMY OF FINANCE** **CMA (Australia)** **International Auditors** **CISI**

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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.



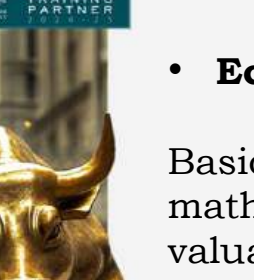








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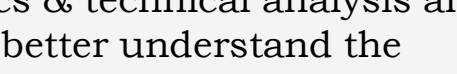



**INTERNATIONAL CERTIFICATE IN
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MANAGEMENT (ICWIM-UK)**

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.







ACM




CIMA




AQU




ACADEMY
OF FINANCE



CMA (Australia)




The Institute of
Internal
Auditors



CISI


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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



Teens 20s 30s 40s 50s 60s

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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.



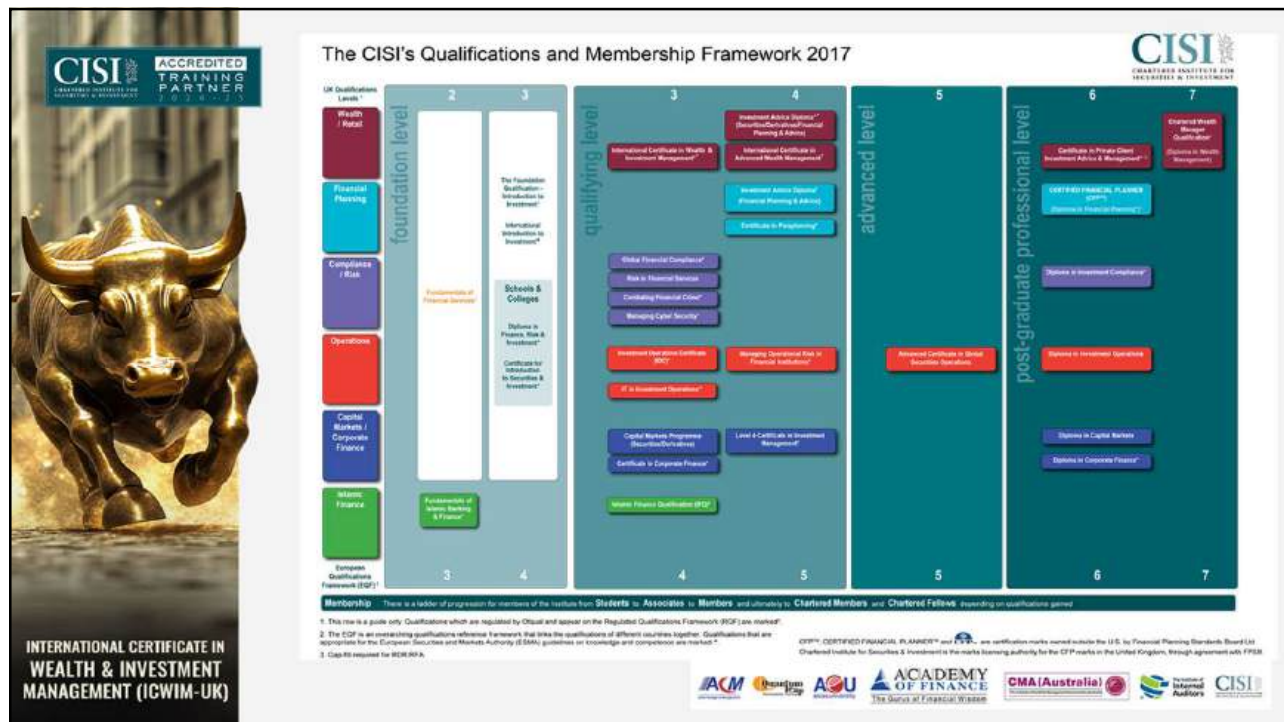
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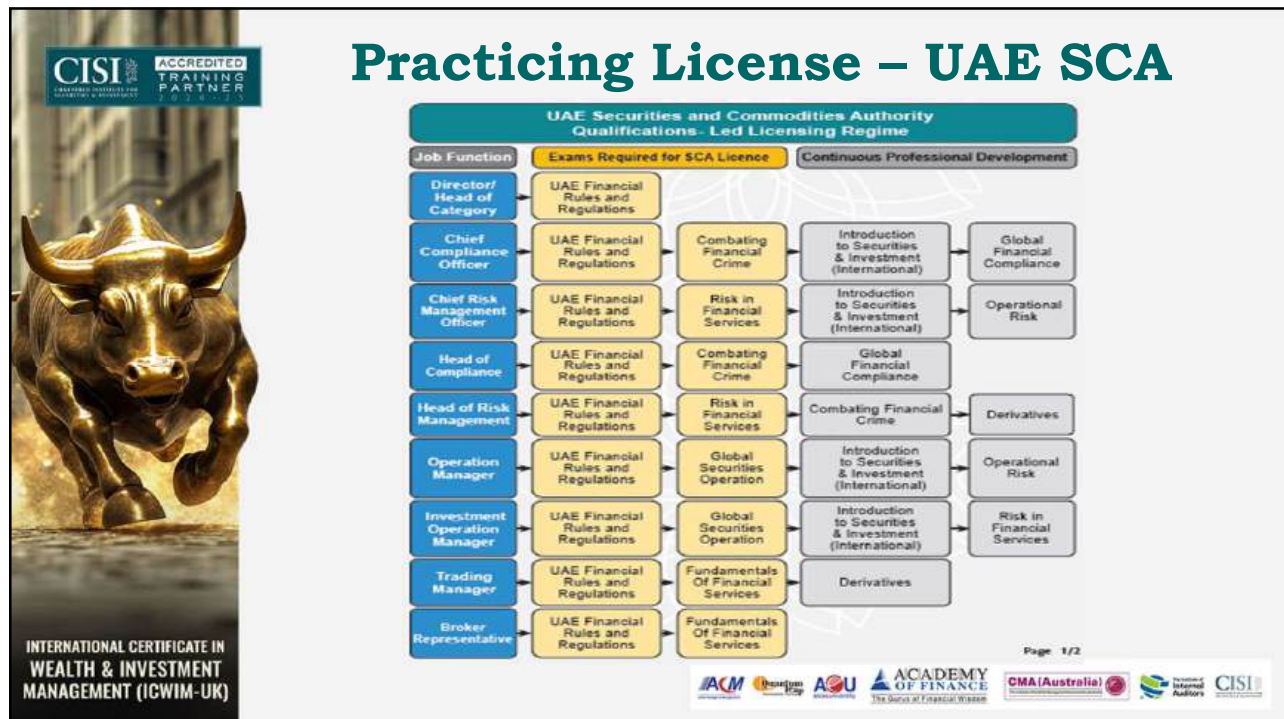
DURATION: 5 MONTHS
JOIN THE NEXT BATCH: MARCH

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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	
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
£ 25 ~~£ 50 (for Sri Lanka)~~
- CISI Examination Fee
£ 190 ~~£ 377 (for Sri Lanka)~~
- CISI Membership Fee
£ 110




Completion time **5** **Months**

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ACM, OpenLearn, AOU, ACADEMY OF FINANCE, CMA (Australia), Internal Auditors, CISI

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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
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MANAGEMENT (ICWIM-UK)

Facilitator



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

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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MANAGEMENT (ICWIM-UK)

Facilitator



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

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

Facilitator



Nishantha Jayaweera
CFA, FRM
Additional Director - Investment 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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INTERNATIONAL CERTIFICATE IN WEALTH & INVESTMENT MANAGEMENT (ICWIM-UK)

Facilitator



Nishantha Jayaweera
CFA, FRM
Additional Director - Investment 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 Additional Director - Investment Management Department .









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INTERNATIONAL CERTIFICATE IN
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Get to know Academy Staff



Yameera



Pavithra



Harshini



Thilini









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MANAGEMENT (ICWIM-UK)

Get to know Academy Staff



Rumaiza



Upeksha



Himali



Ramya











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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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2018-2021

Academy of Finance Letter of Participation

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

ACM
Association of
Chartered
Managers

AOU
Association of
Overseas
Universities


ACADEMY
OF FINANCE
The Spirit of Financial Wisdom

CMA (Australia)
Chartered Accountants

The Institute of
Internal
Auditors


CISI
Chartered Institute of
Securities & Investments

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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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MANAGEMENT (ICWIM-UK)

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

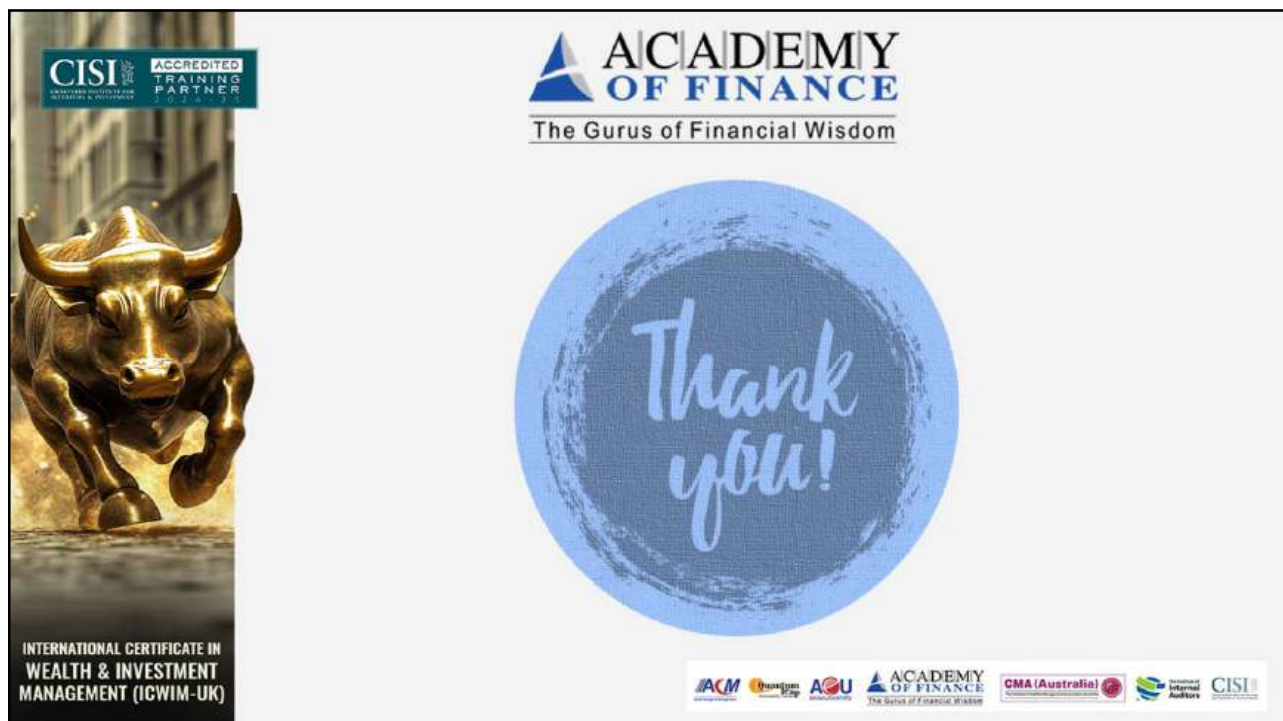
Registration with the CISI after 15th November 2025

Examination Window 03rd December 2025 - 03rd January 2026

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ACADEMY OF FINANCE
The Gurus of Financial Wisdom

Thank you!

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

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