

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

BESPOKE QUALIFICATION FOR INVESTMENT PROFESSIONALS AND INDIVIDUAL INVESTORS

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SYMBOLS OF WEALTH
KUBERA YANTRA

CISI
ACCREDITED TRAINING PARTNER 2025-26

INTERNATIONAL CERTIFICATE IN WEALTH & INVESTMENT MANAGEMENT (ICWIM)

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

Duration : 05 Months

ICWIM 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, fiduciary relationship and lifetime financial planning.

More info : 0772 840 850
yameera@academy.ik

SYMBOLS OF WEALTH
SALMON TOTEM

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INTERNATIONAL CERTIFICATE IN WEALTH & INVESTMENT MANAGEMENT (ICWIM)

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SYMBOLS OF WEALTH
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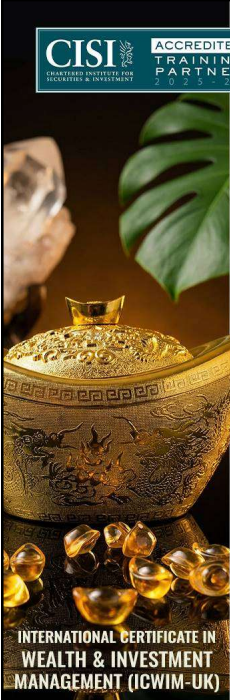
Agenda

- 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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What is CISI?

Chartered Institute for 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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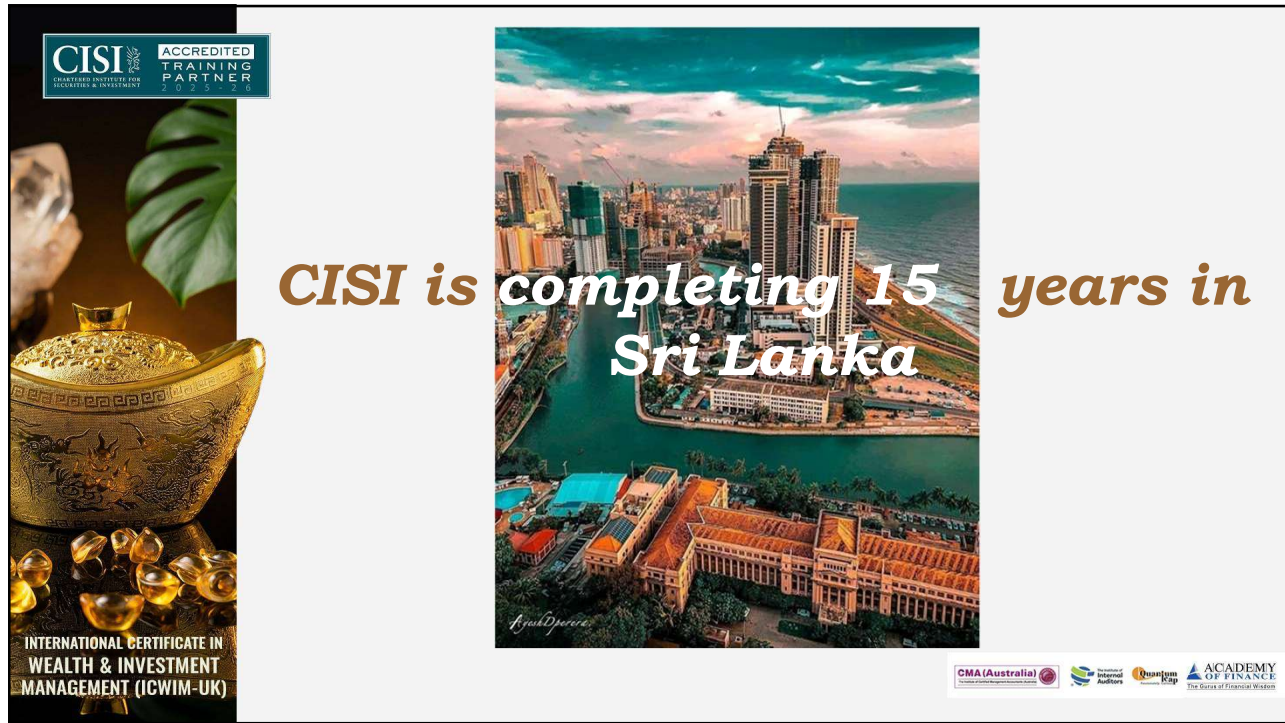


CISI

CHARTERED INSTITUTE FOR
SECURITIES & INVESTMENT





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CISI is completing 15 years in Sri Lanka

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CMA (Australia) | International Auditors | Quantum Leap | ACADEMY OF FINANCE The Gurus of Financial Wisdom

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CISI CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT

15 YEARS ANNIVERSARY


ACADEMY OF FINANCE The Gurus of Financial Wisdom

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CMA (Australia) | International Auditors | Quantum Leap | ACADEMY OF FINANCE The Gurus of Financial Wisdom

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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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Mr. Jhon Preston
Chief Operating Officer CISI

Mr. Kevin Moore
Executive Director CISI



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Tracy Vergo OBE, The CEO of CISI at the CMA ANZ Qualifying Program.






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Academy of Finance

Founded Seventeen 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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A PATHWAY TO CHARTERED WEALTH MANAGER



WHO SHOULD ATTEND?

- Individual Investors & Entrepreneurs
- Professional Bankers
- Investment Advisors and Stockbrokers
- Insurance Professionals and Wealth Planners

FREE ONLINE ZOOM session
09TH OF APRIL

INDUCTION & FIRST LECTURES
FROM 6.30 PM ONWARDS

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A combination of the CISI modules makes you eligible for practicing license under the UAE Securities & Commodities Authority Licensing Regime (SCA)

05 MONTHS

WORLD WIDE ZOOM classes



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JOIN THIS INTAKE
+94772 840 850






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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

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The Gurus of Financial Wisdom

MORE INFO : +94 77710 2449

WORLD WIDE ZOOM classes | **Online exams**

Starting in May 2025



GLOBAL FINANCIAL COMPLIANCE

YOUR PATHWAY TO A GLOBAL JOURNEY



FREE INDUCTION

08th April
from 3.00 pm to 5.30 pm

DURATION : 5 MONTHS

JOIN THE NEXT INTAKE

WORLD WIDE ZOOM classes

Online exams

Key Features

- Specialist qualification covering key aspects of compliance
- Globally portable and addresses international issues reflecting the needs of worldwide market

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).

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

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yameera@academy.jk






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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
 MCSI, 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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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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Is it really difficult to sell Investment Plans?

Because you need to compete with other attractive investments

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INTERNATIONAL CERTIFICATE IN WEALTH AND INVESTMENT MANAGEMENT (ICWIM)

Learn how to be a better Investment Advisor

for **WEALTH PLANNERS AND INVESTMENT ADVISORS**

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

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

JOIN THE NEXT INTAKE **JUNE** **VIRTUAL CLASSES AVAILABLE**

HOW TO BE A RELATIONSHIP MANAGER WITH A DIFFERENCE?

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.

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for **BANKERS** Relationship Managers, Branch Managers and deposit mobilising teams

Clients' financial needs differ during the start-up, when nurturing growth and selling through the difficult times. Learn to offer the right product at the right time.

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

JOIN THE NEXT INTAKE **JUNE** **VIRTUAL CLASSES AVAILABLE**

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 lot 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**

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.

JOIN THE NEXT INTAKE **OCTOBER** **VIRTUAL CLASSES AVAILABLE**






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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.



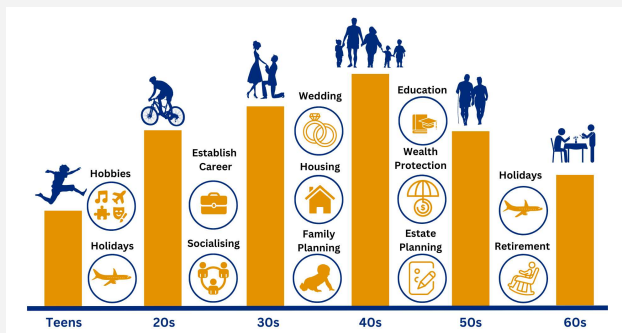
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What will you learn?

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
- Internal Controller
- Clearing Officer
- Promoter
- Anti-Money Laundering Officer

- Risk Management Officer
- Investment Manager/Chief
- Compliance Officer
- Trading/Operations Manager

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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WORLD WIDE
ACSI classes
Online exams

DURATION: 5 MONTHS
JOIN THE NEXT INTAKE: MARCH






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The CISI's Qualifications and Membership Framework 2017

UK Qualifications Levels*

- Wealth / Retail
- Financial Planning
- Compliance / Risk
- Operations
- Capital Markets / Corporate Finance
- Islamic Finance





European Qualifications Framework (EQF)†

	2	3	4	5	6	7
foundation level		The Foundation Qualification - Introduction to Investment* International Introduction to Investment* Fundamentals of Financial Services* Diploma in Finance, Risk & Investment* Certificate for Introduction to Securities & Investment* Fundamentals of Islamic Banking & Finance*				
qualifying level			International Certificate in Wealth & Investment Management* Investment Advice Diploma** (Securities/Derivatives/Financial Planning & Advice) International Certificate in Advanced Wealth Management* Investment Advice Diploma* (Financial Planning & Advice) Certificate in Paraplaning* Global Financial Compliance* Risk in Financial Services Combating Financial Crime* Managing Cyber Security* Investment Operations Certificate (IOC)* Managing Operational Risk in Financial Institutions* IF in Investment Operations* Capital Markets Programme (Securities/Derivatives) Certificate in Corporate Finance* Islamic Finance Qualification (IFQ)*			
advanced level				Advanced Certificate in Global Securities Operations		
post-graduate professional level					Certificate in Private Client Investment Advice & Management*† DIPLOMA IN WEALTH MANAGEMENT CERTIFIED FINANCIAL PLANNER (CFP®) (Diploma in Financial Planning)† Diploma in Investment Compliance* Diploma in Investment Operations Diploma in Capital Markets Diploma in Corporate Finance*	Chartered Wealth Manager Qualification* (Diploma in Wealth Management)

Membership There is a ladder of progression for members of the Institute from **Students** to **Associates** to **Members** and ultimately to **Chartered Members** and **Chartered Fellows** depending on qualifications gained



1. This row is a guide only. Qualifications which are regulated by Ofqual and appear on the Regulated Qualifications Framework (RQF) are marked*.
 2. The EQF is an overarching qualifications reference framework that links the qualifications of different countries together. Qualifications that are appropriate for the European Securities and Markets Authority (ESMA) guidelines on knowledge and competence are marked †.
 3. Gap-fill required for RDR/RIFA.

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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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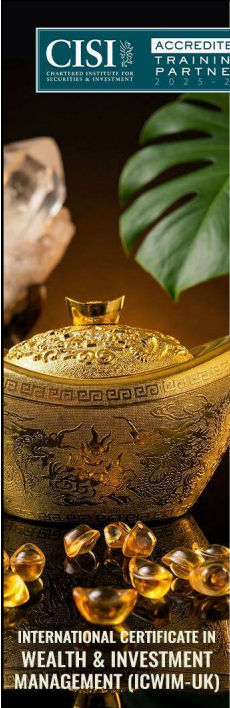
Practicing License - UAE SCA

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?

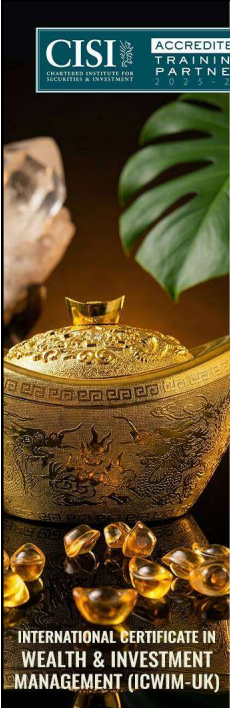
- CISI Registration Fee
£ 34 ~~£ 68 (for Sri Lanka)~~
- CISI Examination Fee
£ 202 ~~£ 403 (for Sri Lanka)~~
- CISI Membership Fee
£ 110



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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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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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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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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Get to know Academy Staff




Pavithra




Harshini



Rashika







Yameera



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Get to know Academy Staff





Ramya **Upeksha** **Hashanika** **Himali**

CMA (Australia) **Institute of Internal Auditors** **Quantum Leap** **ACADEMY OF FINANCE**
The Guru of Financial Wisdom

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Get to know Academy Staff



Madhavi **Renuka**

CMA (Australia) **Institute of Internal Auditors** **Quantum Leap** **ACADEMY OF FINANCE**
The Guru of Financial Wisdom

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Code of Conduct

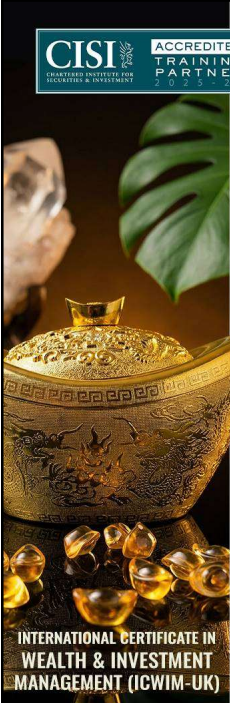
Expected from the participants

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

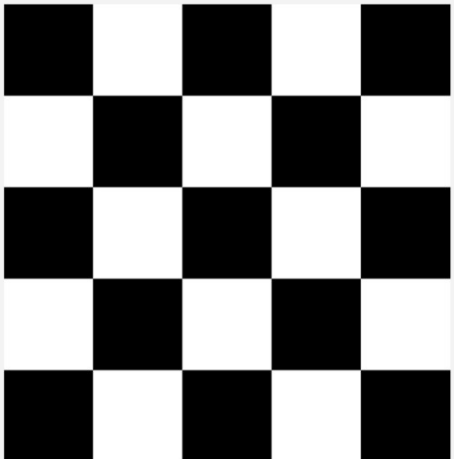





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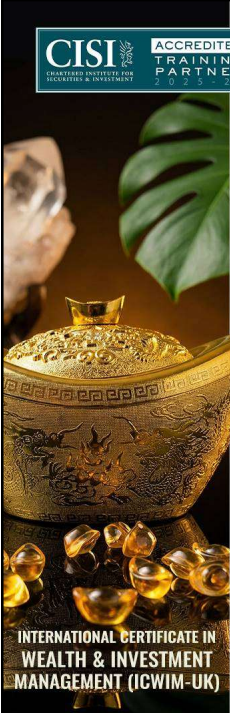


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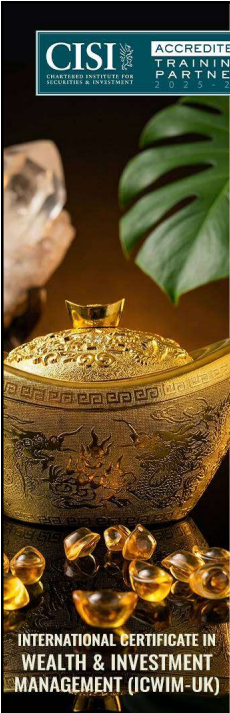


Academy of Finance Letter of Participation


- 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





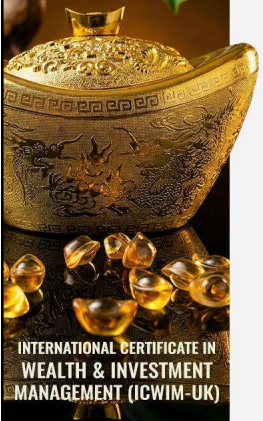
If you are interested, not yet registered
Contact us for registration








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THE JOURNEY BEGINS

- ❖ **Registration with the CISI before 30 April 2026**
- ❖ **Examination Window before 01st of March 2027**

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2023-2026
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Thank you

CMA (Australia) International Auditors Quantum Key ACADEMY OF FINANCE The Gurus of Financial Wisdom

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