



國際專業教育培訓集團

International Professional Trainings Group Limited

特許財富管理師

Chartered Wealth Manager, CWM®

真正的財富管理師擔當著客戶的私人銀行家角色，除了根據客戶於不同階段的需要度身訂造及管理最合適的投資組合外，還需為客戶提供資產分配、稅務及遺產管理等服務。故此，只有擁有上述專業知識者，才能獲得高端客戶垂青。

近年席捲全球的財富管理概念，除了使之成為金融市場內需求極高的專業服務外，亦造就一個金融界事業發展的罕見黃金機會。特許財富管理師(CWM®)專業培訓課程為理財投資界從業員度身訂造，全面提升財富管理知識，協助學員考取全球認受的專業認證，更額外加入提升營銷技巧之培訓部份，絕對值得渴望於這個財富管理大趨勢中分一杯羹之人士修讀。

以下國際企業都擁有獲國際金融管理學會認證之財富管理專業人才：中國建設銀行，中國銀行，交通銀行，中國招商銀行，中國銀行家協會，花旗銀行，香港匯豐銀行，德意志銀行，美國證券管理委員會，印度海外銀行等。

費用：\$21,800+

\$ 3,120(考試費)

註冊專業條件：

- 於認可培訓機構中，完成最少30小時之財富管理專業培訓課程
- 通過CWM專業考試
- 學歷要求
學位持有人：3年以上相關工作經驗
非學位持有人：5年以上相關工作經驗
- CWM認證持有人，需每年取得10個持續進修學分
- 合資格人士可以透過 Executive Certificate in Wealth Management 課程(課程編號:23C06734-8)申請持續進修基金。

培訓導師：

曾仲謙先生

現任國際金融管理學會香港分會會長，曾于不同跨國金融企業擔任資深職位，包括資產管理公司、主要商業銀行集團、金融監管機構及全球四大會計師事務所等。下為部份他擁有的專業資格：法學碩士、財務學碩士、特許財富管理師，CWM®、特許財經分析師，CFA®、認可財務策劃師，CFP^{CM}、註冊會計師，CPA、金融風險管理師，FRM®、註冊企業教練，RCC、身心語言程式學高級執行師

培訓課堂重點：

- 30小時導師教授專業培訓課程
- 模擬試題討論
- 於課堂學到的財富管理知識均非常實用，能完全運用於日常工作中，並帶來非常正面效果
- 合格保證(出席率達80%或以上之學員，若不能取得合格成績，可免費重考考試)

培訓課程大綱：

- 單元一：** 環球財富管理及有關本地監管架構的最新信息 (10%)
以環球財富管理趨勢作例子，提供財富管理世界的最新定義、信息和全球發展的趨勢，亦會介紹香港的監管架構的最新信息。
- 單元二：** 財富管理產品 (30%)
廣泛涵蓋世界上現有的財富管理產品，包括基金，固定收益，衍生工具，結構性產品，以及各種另類投資，如對沖基金和私募股權，分析近年來各種產品的特色、挑戰及市場趨勢。
- 單元三：** 投資組合的管理策略 (35%)
探討如何從管理客戶投資組合中，了解客戶的投資行為，並以適當的資產配置、專業知識，履行應有盡職審查過程及提供績效評估技巧。
- 單元四：** 風險管理與財富規劃技能 (15%)
討論風險管理和財富規劃策略，並包括稅務規劃，遺產保護，基金規劃及其他財富保值策略，以及財富積累和財富轉移等知識。
- 單元五：** 客戶建設和客戶關係管理技能 (10%)
利用顧問式銷售方法，更新傳統銷售觀念由「銷售產品給客戶」到「幫助客戶購買產品」，以提升專業服務形象，安全優質的服務文化，並了解人際關係管理概念於財富管理的運用。

上課時間表：

2018年5月新班

Month	Date	Day	Time
May	9, 11, 18, 25, 30	Wed/Fri	7:00pm - 10:00pm
June	2, 16	Sat	9:30am - 6:00pm
July	**4 CWM Exam	Wed	7:00pm - 10:00pm

- 共：33小時 (包括考試)
- 課程費用：港幣21,800元；考試費用：港幣3,120元
- 中文授課及中英文試卷
- 中環德輔道中55號協成行中心15樓
- 費用存入以下上海商業銀行戶口：
港幣賬號：338-82-05746-8 (Institute of Global Managers)
並電郵存款收據至 info.nip.edu@gmail.com
- 如支票付款，抬頭填寫「Institute of Global Maganers」
寄往香港英皇道250號北角城中心16樓1604 室。
- 電話:(852) 3598 5020 電郵:info.nip.edu@gmail.com
傳真:(852) 3598 5021 網址:http://nip.edu.hk/

費用：

教學語言：

上課地點：

付款方法：

查詢報名：



Enrollment Form

CRMID:

Part A: Personal Information					
Name in English		Name in Certificate			
Date of Birth		Sex	Male <input type="checkbox"/> / Female <input type="checkbox"/>		
ID card / Passport No.		Mobile			
Address					
Personal Email		HKCEE Result	Eng. (Syl. B)		Chi.
Education Level	Non-Degree <input type="checkbox"/> / Bachelor <input type="checkbox"/> / Master <input type="checkbox"/> / Doctorate <input type="checkbox"/>	Institute			
Major Subject	Art <input type="checkbox"/> / Business <input type="checkbox"/> / Engineering <input type="checkbox"/> / Humanity & Language <input type="checkbox"/> / Law <input type="checkbox"/> / Medicine <input type="checkbox"/> / Science <input type="checkbox"/> / Social Science <input type="checkbox"/> / Other:				

Part B: Employment Information			
Company		Position	
Company Email		Working Experience	Year (s) Month (s)

Part C: Enrollment			
I. Program Enrollment			
Program Title		Start of Course	Program Fee
1.			
2.			
II. Membership Enrollment			
Membership Type	Membership No.	Membership Period	Membership Fee
Associate <input type="checkbox"/> / Fellow <input type="checkbox"/> / Corporate <input type="checkbox"/>			
Total Amount (I.+II.)			

Terms and Conditions
<ol style="list-style-type: none"> Acceptance of this enrollment shall be at the sole discretion of International Professional Trainings Group Limited All payment should be made by cash, bank transfer or cheque payable to " Institute of Global Managers " <ul style="list-style-type: none"> -Direct Bank in to our Shanghai Commercial Bank Account (A/C No.:338-82-05746-8 Institute of Global Managers) and then send the original bank-in slip to our Office. Please write the course name and your name at the back of the slip. -Send a crossed cheque payable to " Institute of Global Managers" to Rm 1604, 16/F, Fortress Tower, 250 King's Road, Hong Kong. All payments are non-refundable and non-transferrable Any reschedule request has to be made at least 14 days before the start of the training event with written notice, otherwise, request of reschedule will not be arranged Internation Professional Trainings Group Limited reserves the rights to make any changes in its training staff, course outline and schedule, notification for the corresponding changes will be sent to members in advance

6. All information and program update will reach clients through email. Client is responsible for updating International Professional Trainings Group Limited if there is any change of correspondence email and mailing address
7. Confirmation email will be sent to clients within 3 working days after enrollment, clients are suggested to inform International Professional Trainings Group Limited if confirmation email is not received
8. International Professional Trainings Group Limited reserves the rights to make final decision in the event of dispute or arbitration
9. These terms and conditions is governed and constructed in accordance with the laws of the Hong Kong Special Administrative Region

Part D: Continuing Education Fund

1. CWM/CWMA/CPNLP/CFA/FRM has been included in the list of CEF reimbursable programmes.
2. Eligible applicants will be reimbursed up to 80% of the course fee or HK\$10,000, whichever sum is the less. Each applicant may claim reimbursement of more than one reimbursable course, subject to the ceiling of HK\$10,000 during his / her lifetime.
3. Application for CEF must be made to Office of the Continuing Education Fund (OCEF) before the programme / course commences. Late applications are not acceptable.

How to Apply for CEF

1. Complete the application form(s) for the relevant programme(s) and submit an application for admission to the IPTGL Offices.
2. An applicant who is admitted to the programme should complete all programme registration procedures and submit the completed Application Form for CEF [SFAA 192(2015)] to IPTGL Offices by hand or by post. IPTGL Offices will then certify the Form and return it to the applicant.
3. Submit the certified Application Form for CEF together with a copy of the Hong Kong Identity Card to OCEF by post or by hand.

Will you apply CEF?

Yes No

Part E: Declaration and Signature

The applicant acknowledges and confirms that,

1. The particulars of the details set out in this enrollment are true and correct
2. I have read and understood the terms and conditions of this enrollment form

Signature:

Date:

For Official Use Only

Payment Methods: Cash / Cheque / Bank Transfer

Channel:

Remarks:

Latest Enquiry:

Consultant:

Materials: No / Yes, including:

Sponsorship:

CEF / **Company** / **None**