

ADVANCED

Chartered Wealth Management (CWM®) Program



India's Premier Certification for **High-Income**,
Next-Gen Careers in Wealth & Finance

About AAFM

American Academy of Financial Management (AAFM)



A GLOBALLY RECOGNIZED LEADER IN WEALTH MANAGEMENT & FINANCIAL EDUCATION.



Presence in 17+ countries



Works with 800+ universities worldwide



ISO 29990 Certified & TUV Accredited



Awarded “Best BFSI” by TV9 Network

GLOBAL IMPACT OF CWM CERTIFICATION:

- Recognized in 150+ countries
- 50,000+ CWM® certificants
- 3,00,000+ global alumni

YOUR CERTIFICATION CARRIES WEIGHT ACROSS THE GLOBE.



About Jaipuria Group

80+ Years of Educational Excellence



Management Institutes:
Lucknow | Noida | Jaipur | Indore



School Network:
60+ campuses | 55,000+ students



iJaipuria:
Edtech vertical of Jaipuria Group

Accreditations & Rankings:



AACSB Accredited – Top 1%
B-Schools in India, Top 6%
globally



NIRF Ranking – Noida (#41),
Lucknow (#67), Jaipur (#74),
Indore (101–125)



Other Recognitions – NBA |
AICTE | NAAC | AIU

Learning under Jaipuria means legacy, credibility, and a direct path to excellence.

About The Program

**India's only end-to-end wealth management certification
covering Indian & global markets.**

Skill Areas Covered:

LEVEL 1 — Foundation (INDIAN CONTEXT)

- Concept of Wealth Management
- Indian & Global Financial System
- Investment Vehicles of Wealth Management
- Measuring Investment Risk in Returns
- Concept of Insurance & Risk Management
- Role of Wealth Management in Banking
- Legalities in Wealth Management
- Tax Laws For Wealth Management
- Life Cycle Management
- Intergenerational Wealth Transfer & Tax Planning

LEVEL 2 — Advanced (Global CONTEXT)

- Equity Analysis
- Alternative Investment Products in Wealth Management
- Real Estate Valuation & Analysis
- Behavioral Finance in Wealth Management
- Relationship Management by a Wealth Manager
- Loan & Debt Management
- Portfolio Management Strategies
- International Tax & Trust Planning
- Wealth Management Planning
- Advanced Wealth Management

LEVEL 3 — Chartered (Elite Skills)

- ✓ AI-Driven Analytics
- ✓ Algorithm Trading Strategies
- ✓ Robo-advisory Services
- ✓ Sentiment Analysis & Market Mood
- ✓ Family Office Management
- ✓ Advanced Portfolio Construction with AI
- ✓ Ethics in Finance Technology

Why Choose This Program

India is entering its most explosive wealth-creation phase ever:



80%
increase inHNIs by 2031



1.6M+
millionaires by 2026



Family Offices
rising sharply



FinTech wealth
platforms expanding fast



First-gen millionaires
seeking certified advisors

This program prepares you to

Advise high-net-worth clients with structured wealth management solutions

Transform financial data into actionable insights

Leverage AI for predictive, personalized advisory and portfolio optimization



Gain a rare combination of skills that positions you as a future-ready, top-tier wealth professional.

» Companies Trust Us

ALPHA CAPITAL™
SIMPLIFYING YOUR FINANCESAMBIT
Acumen at work

ANANDRATHI

Angel Broking®
Service Truly PersonalizedAsit C. Mehta
INVESTMENT INTERMEDIATES LTD.ASK
WEALTH MANAGEMENTbharti AXA
jeevan suraksha ka/
naya nazariyaADYEN BHAI
CAPITAL
Ananya Capital Private EquityBROKERS
FORUMBonanza
Human Resource SolutionsdeVere
GROUPEdelweiss
Mutual FundIFAN
Independent Financial Advisor Network
Shaping Tomorrow's Financial PlannersiFAST
FinancialIndiabulls
ASSET MANAGEMENTKARVY
PRIVATE WEALTH

L&T Mutual Fund

Lalit Manharlal
PARK HOTELPRIVATE WEALTH
Mimosa Bank

Nj

Principal
pnb
Asset ManagementPrincipal
Retirement
AdvisorsReliance
MUTUAL FUND:
Wealth Sets You FreeReliance
Securitiessmc
Moneywise. Be wise.SOPP
SOCIETY OF FINANCIAL PLANNERSUNIVERSAL
TRUSTEESutí
UTI Mutual Fund
Let's plan to get rich

WELCON

ZEN Money™
The art of investingRivergate
Capital Partners
Beyond Your PortfolioMOTILAL OSWAL
Research News
Solid Research. Solid AdviceBAJAJ
CAPITAL
ALWAYS ACTING IN YOUR INTEREST (%)Hedge Finance
Grow with an edge!

Your gateway to placements, collaborations, & industry access.



Himanshu Patodi
Area Head - Personal Wealth
Solutions, HSBC



Hemant Gupta
Founder of Happy Niveshakpta



Sujata Maji
Relationship Manager,
Banking & Wealth



Pankaj Khanna
Wealth & Investment Advisor,
VR Capital Group



Y Sunita
Senior Manager, Mintbox
Advisory LLP



Paras Kotak
Senior Executive - Investment
Advisory, Motilal Oswal Wealth Ltd.



Sunil Padmanabhan
Partner - Qualified Financial
Advisor



Deep Gandhi
Management Consultant,
Infosys Consulting



Aaditya Patel
Para Financial Planner,
Foresight Financial Advisory



Ravinder Singh Rayat
Assistant Vice President,
Homeville Consulting



Swaraj Jain
Founder of Finvestera

Our Alumni Network

Examination

Examination Type	Duration	No. of Questions
MCQ's (Objective)	3 Hours	85 Questions
Passing Criterion	Frequency of Examination	
50% Passing Marks No Negative Marking	50% Passing Marks No Negative Marking	

Partners: Pearson Vue & NSE centers across India

Registration Pathways



*12th pass, however certification will be provided on graduation

Investment In Your Career

Program Fee

₹1,00,000/- ~~₹1,25,000~~
GST Applicable

For a one-time investment, gain:

- A globally recognized certification
- Advanced skills in Wealth, Data, & AI
- Access to high-value career opportunities

Join the elite. Build expertise. Transform your career.



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