

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 in HNIs by 2031



FinTech wealth

platforms expanding fast



1.6M+

millionaires by 2026



First-gen millionaires

seeking certified advisors



Family Offices

rising sharply

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 Finances



AMBIT
Acumen of work



ANANDRATHI
ANANDRATHI GROUP



Angel Broking™
Service Truly Personalized



Asit C. Mehta
INVESTMENT INTERMEDIATES LTD.



ASK
WEALTH MANAGEMENT



bharti AXA
jeevan suraksha ka
naya nazariya



**ADITYA BIRLA
CAPITAL**
Financial Services Group



**BROKERS
FORUM**



Bonanza
Human Resource Solutions



deVere
GROUP



Edelweiss
Mutual Fund



IFAN
Independent Financial Advisors Network
Shaping Tomorrow's Financial Planners™



iFAST
Financial



Indiabulls
ASSET MANAGEMENT



KARVY
PRIVATE WEALTH



L&T Mutual Fund



Latin Manharlal
SINCE 1965



PRIVATE WEALTH
Wealth Management Solutions



NIP



Principal
pnb
Asset Management



Principal
Retirement
Advisors



RELIANCE MUTUAL FUND
Wealth Truly Your Priority



RELIANCE
Securities



smc
Moneywise. Be wise.



SOFPS
SOCIETY OF FINANCIAL PLANNERS



**UNIVERSAL
TRUSTEES**



uti
UTI Mutual Fund
Let's plan to get rich



WELCON



ZENMoney™
The art of investing



Rivergate
Capital Partners
Beyond Your Possibilities



MOTILAL OSWAL
Equity Research & Advisory
Solid Research. Solid Advice



**BAJAJ
CAPITAL**
ALWAYS ACTING IN YOUR INTEREST (R)



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