AMERICAN ACADEMY OF FINANCIAL MANAGEMENT
AAFM INDIA
GLOBAL LEADER IN FINANCIAL EDUCATION

iJaipuria

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.

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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.

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About The Program

India's first program integrating Structured Wealth Management covering both Indian and 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
- SQL & Databases for Financial Reporting
- Power BI Dashboards & Data Visualization

LEVEL 3 — Chartered (Elite Skills)

- ✓ Python & Data Handling for Wealth Analysis
- ✓ Statistics & Financial Visualization
- ✓ 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

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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.

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Companies Trust Us

- ALPHA CAPITAL
- AMBIT — Acumen at work
- ANANDRATHI
- Angel Broking
- Asit C. Mehta Investment Interrmediates Ltd.
- ASK Wealth Management
- bharti AXA — jeevan suraksha ka naya nazariya
- Aditya Birla Capital
- Brokers Forum
- Bonanza — Human Resource Solutions
- deVere Group
- Edelweiss Mutual Fund
- IFAN — Independent Financial Advisors Network
- iFAST financial
- Indiabulls Asset Management
- KARVY Private Wealth
- L&T Mutual Fund
- Latin Manharlal
- Private Wealth
- NJ
- Principal pnb Asset Management
- Principal Retirement Advisors
- Reliance Mutual Fund
- Reliance Securities
- smc — Moneywise.Be wise.
- SOFP — Society of Financial Planners
- Universal Trustees
- uti — UTI Mutual Fund — Let's plan to get rich
- WELCON
- ZEN Money
- Rivergate Capital Partners
- Motilal Oswal — Solid Research. Solid Advice
- Bajaj Capital — Always acting in your interest
- Hedge Finance

Your gateway to placements, collaborations, & industry access.

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Our Alumni Network

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

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Level 1 & 2

Examination

Examination Type
MCQ's (Objective)

Duration
3 Hours

No. of Quesions
85 Questions

Passing Criterion
50% Passing Marks
No Negative Marking

Frequency of Examination
Monthly

Partners: Pearson Vue & NSE centers across India

Registration Pathways

COMPULSORY PATHWAY
- NO Prior work Experience in Financial Services
- Candidate needs to appear for Level 1 & Level 2 examinations

EXPERIENCE PATHWAY
- Minimum 3 years work experience in a Financial Services Related Field
- Candidate needs to appear for only Level 2 examination

CORPORATE PATHWAY
- Every representative of Corporate Member can register through this route and avail price benefit
- No. of Examination will be dependent on the years of work experience candidate holds

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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