



Association of International Wealth Management AIWM  
**Offering a new perspective for private banking  
professionals**



**The Association of International Wealth Management AIWM is a non-profit association established to encourage, promote and strengthen global education in the private banking industry and to set a globally recognised standard for the qualification of private banking professionals.**

Private banking/wealth management is a fast growing and increasingly global industry. Serving today's wealth owners requires a thorough understanding of their individual needs and of the tools that can be applied to meet these needs. The Association of International Wealth Management (AIWM) was established to respond to the growing demand for sophisticated products and professional client service, to identify and meet the needs of wealth owners, and to assist in navigating the increasing regulation and general complexities of globalised financial markets.

The AIWM awards the Certified International Wealth Manager Diploma (CIWM®) and offers private banking professionals a platform for high-quality education, knowhow transfer and international networking.

The association was founded by AZEK, the Swiss Training Center for Investment Professionals, LawInContext, the online interactive legal information and training service created by the global law firm Baker & McKenzie and Central Law Training (CLT), UK's leading provider of postgraduate legal training and exclusive course provider of the renowned STEP Diploma in International Trust Management. Based in Switzerland, the AIWM operates on a global scale.

The association is a development of the renowned Swiss Financial Analysts Association (SFAA). SFAA was established in 1962 and now has more than 1,850 members including financial and investment fund analysts, asset managers, wealth managers and fund managers.



### **AIWM Objectives – Centralising education, exchange and ethics**

The AIWM seeks to achieve its objectives by:

- facilitating research and high-quality education and training in the field of international wealth management
- providing an internationally recognised certification in the private banking field, the Certified International Wealth Manager (CIWM®)
- establishing a Code of Ethics governing the work and activities of members
- providing members with opportunities for continuing professional development
- fostering the exchange of information and experience between members and partners
- cooperating with national and international partners
- representing the Association's interests vis-à-vis governmental and regulatory authorities as well as the public at regional, national and international level
- communicating actively between members, partners, media representatives and the public
- assisting wealth owners in identifying appropriately trained professionals to help address their wealth management needs

**AIWM assists graduates in acquiring core competencies in wealth management and in qualifying for key positions within the industry.**

**AIWM supports employers in reaching highly qualified specialists that best meet the individual needs of a global client base.**

**AIWM allows clients to obtain first-class, reliable and comprehensive advice and services.**

## **AIWM Community – Bringing together private banking professionals**

The AIWM is for professionals involved in the private banking industry that have an interest in the needs of today's wealth owners. Membership is of specific interest to:

- Wealth managers
- Portfolio managers
- Investment advisors
- Asset managers
- Fund managers
- Relationship managers
- Economic researchers
- Accountants
- Insurance consultants and Product developers
- Wealth and Estate planners
- Trust and Estate practitioners
- Lawyers

Professional membership is open to those who have demonstrated competence in the field of private banking/wealth management through examination or experience. All members accept the obligation to uphold and abide by the AIWM Code of Ethics.

### **Professional membership**

Professional membership can be achieved by:

- examination
- demonstratable professional experience/University degree

#### **Examination**

This route is available to professionals who:

- have been awarded the Certified International Wealth Manager designation (CIWM®)
- provide references attesting to good character and personal integrity
- agree to abide by the Association's Code of Ethics

#### **Professional experience/University degree**

Experienced practitioners, able to demonstrate at least five years of active practice in cross-border private banking/wealth management or graduates who have completed University or other tertiary studies including examinable course work on at least five of ten defined areas may apply for membership which will be granted at the discretion of the AIWM. This route to membership will be phased out on a timetable to be published at a later date on the AIWM website.

#### **Student membership**

Anyone enrolled in the CIWM program will automatically be granted a student membership. This membership will last for the duration of the program.

#### **Why become a member of the AIWM?**

The AIWM is a professional association for wealth management specialists around the world. Besides providing access to first-class education and to an exclusive platform for international networking, AIWM offers numerous possibilities to profit from its know-how pool.

#### **AIWM membership benefits include:**

- updates on national and international wealth management issues
- a forum enabling members to exchange ideas, views, problems and information
- invitations to educational courses, conferences and events
- international news feeds relevant to the private banking and financial industry
- access to a global community of wealth management professionals

## **AIWM Education Program – providing knowledge to go from the ordinary to the extraordinary**

The AIWM awards the Certified International Wealth Manager Diploma CIWM®, an integrated education program which is delivered internationally in partnership with approved local training providers.

Features of the training program include:

- face-to-face workshops delivered in major international centres by leading academics and business experts in the field of private banking
- comprehensive course manuals, support readings and texts
- Portfolio management simulator allowing students to practice new skills in life-like situations
- on-line jurisdiction specific e-learning tool which enables students to put theory into practice by working through and creating case studies using realistic data and calculations

The CIWM program is an advanced, internationally recognised education program for experienced financial, legal and other professionals in the wealth management industry. The CIWM training program supports the industry's needs for highly qualified specialists and focuses on the holistic and long-term approach to client service. It combines profound theoretical knowledge with the practical skills needed for successfully carrying out business in a dynamic global environment, and to manage the challenges and expectations in today's world of private banking.

Further information, including full syllabuses and a list of local training providers, can be found on the AIWM website at [www.aiwm.org](http://www.aiwm.org).



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