

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 Associate Wealth Manager (AWM®) and Certified International Wealth Manager (CIWM®) and offers private banking professionals a platform for high-quality education, knowhow transfer and international networking.

The Association was founded in 2007 by AZEK, the training centre of the Swiss Financial Analysts Association. The Association is a development of the renowned Swiss Financial Analysts Association (SFAA). SFAA was established in 1962 and is the largest association in Europe. It has more than 3,500 members including financial and investment fund analysts, asset managers, wealth managers and fund managers.

Based in Switzerland, with its Head Office located in Bülach, the AIWM operates on a global scale.

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 Associate Wealth Manager certification (AWM®) or the Certified International Wealth Manager (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.

Student membership

Anyone enrolled in the programs 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:

- access to a global community of wealth management professionals
- access to the AIWM campus seminars
- special rates for events and seminars
- special rates for on-line courses

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

The AIWM awards the Associate Wealth Manager AWM® and 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:

- comprehensive course manuals, support readings and texts
- on-line training exercises

The AWM program is a core knowledge program intended for all client advisors in the areas of Investment advisory, Financial planning and Wealth management. The program covers the necessary core competencies required in today's rapidly changing markets.

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 about the programs can be found on the AIWM website www.aiwm.org

CIWM – opening doors to an international career

In some countries including North America, Asia and Europe regulators recognise the CIWM designation as a relevant qualification. In the United Kingdom the AIWM has an awarding body status and the CIWM is recognised by the Financial Conduct Authority (FCA) as being a Retail Distribution Review (RDR) compliant Key 2 qualification.

UK Naric, the national agency responsible for comparable level of overseas qualifications, recognises the CIWM as comparable to a British Bachelor level 6 diploma.



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 internationally recognised certifications in the private banking field
- 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.