



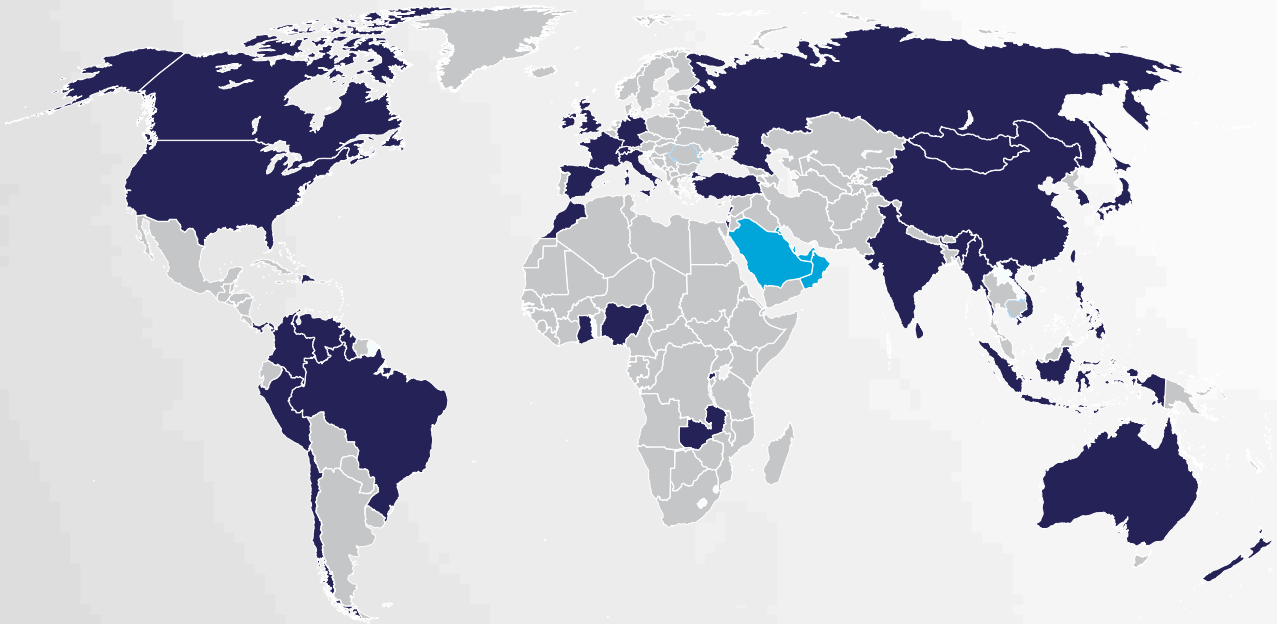
CISI EXAM TRAINING SOLUTIONS

International Certificate in
Wealth and Investment
Management (ICWIM)

Table of Contents

Kaplan: Programs Delivered on a Global Scale	3
Kaplan: Regional Expertise	4
About the CISI : ICWIM Programme	5
Our USPs	6
Our Complete Learning Solution	7
CISI : ICWIM OnDemand	8
Trainer Profiles	10
Our Clients	12

Kaplan: Programs Delivered on a Global Scale



Kaplan operates from nearly 400 locations in over 40 countries. We employ trainers, facilitators, lecturers, coaches, speakers, and instructional designers in approximately 100 languages around the world. Whether you are a multinational corporation with offices in every continent or a business based in a single location, we can deliver commercially relevant programs close to home.

1M+

Delegates worldwide

1K+

Education partners

30+

Countries

2600+

Business clients

75+

Years transforming lives

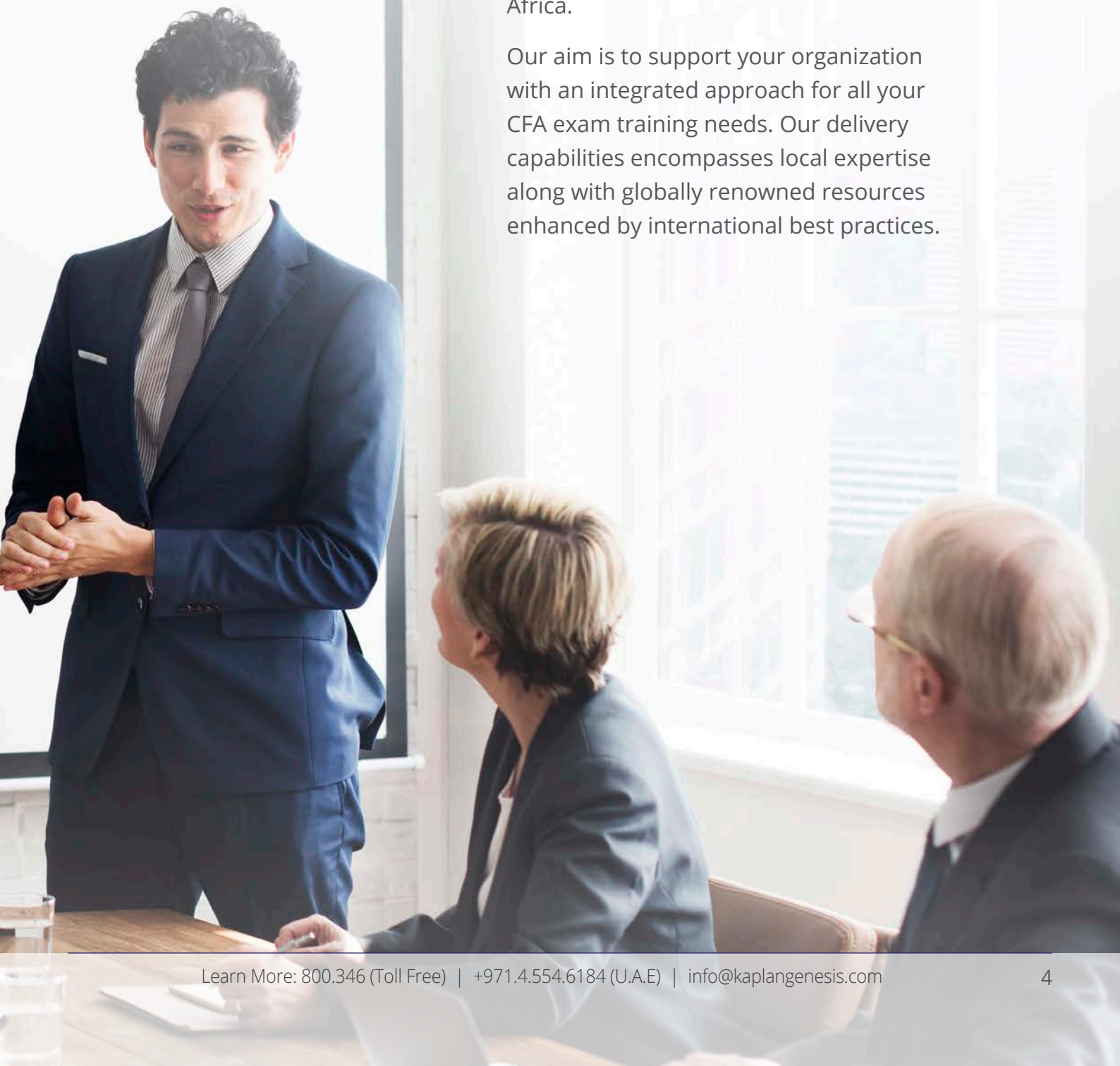
Largest

Financial training provider

Kaplan: Regional Expertise

Kaplan is a leading provider of professional development solutions managed by highly qualified and experienced industry experts who are passionate about the effective delivery of high quality education in Middle East and Africa.

Our aim is to support your organization with an integrated approach for all your CFA exam training needs. Our delivery capabilities encompasses local expertise along with globally renowned resources enhanced by international best practices.



About the CISI : ICWIM Programme

Growing prosperity is increasing the demand for private banking and wealth management services, whilst the turmoil in the financial markets demonstrates the need for robust and focused solutions to help clients withstand market volatility and preserve their wealth. ICWIM covers the essentials of financial planning, private client asset management, fund management, advisory functions and investment analysis from a global perspective.

Wealth Management is the fastest growing sector in the Financial Services industry and the demand for certified professionals is growing exponentially. With the ICWIM Programme, you will learn about the range of assets and investment products available in the market and you will gain the knowledge to provide financial advice and find appropriate solutions to meet the investment, retirement and protection planning needs for your clients.

ICWIM KEY FEATURES



Prepare for a career in wealth management



Available to all



First step in the CISI's wealth/retail pathway



Globally focused



Free CISI Student membership



ACSI designatory letters

WHO SHOULD ATTEND?

ICWIM is suitable for a wide audience - from new entrants to professionals already working in the financial industry. This qualification is appropriate for everyone aspiring to take on challenging roles in the area of Private Banking, Financial Advisory and Wealth Management industries.

Our USPs



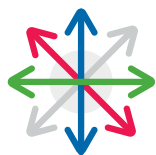
We are Kaplan

- One of the world's largest and most diverse education providers. Throughout our 80-year history, Kaplan has been a beacon for expanding educational access to the masses and is a leader in instructional innovation



Training pedigree

- Experienced instructors, best in the industry - who are ICWIM qualified themselves with in-depth teaching and industry credentials



Comprehensive product elements

- Comprehensive product elements: Our ICWIM exam prep solution comprises of pre-assessments, mock exams, preparatory and revision elements supported with a high-evolved e-learning system designed to be easily customised



E-Learning support

- Kaplan's ICWIM On-demand solution is a holistic self-study online course with resources specifically designed for online learning. Hosted on our award-winning proprietary platform, it gives you the best of both worlds, combining the structure of a tutor-led course, with the flexibility to start studying anytime, anywhere



Monitoring and feedback

- We're dedicated to helping your candidates achieve their goals through our constant performance monitoring and feedback processes. Alongside the candidates' performance reports on MyKaplan's dashboard, our team of subject matter experts would also give a one-to-one feedback to your candidates to ensure they are driven closer towards exam success



ACCREDITED TRAINING PROVIDER

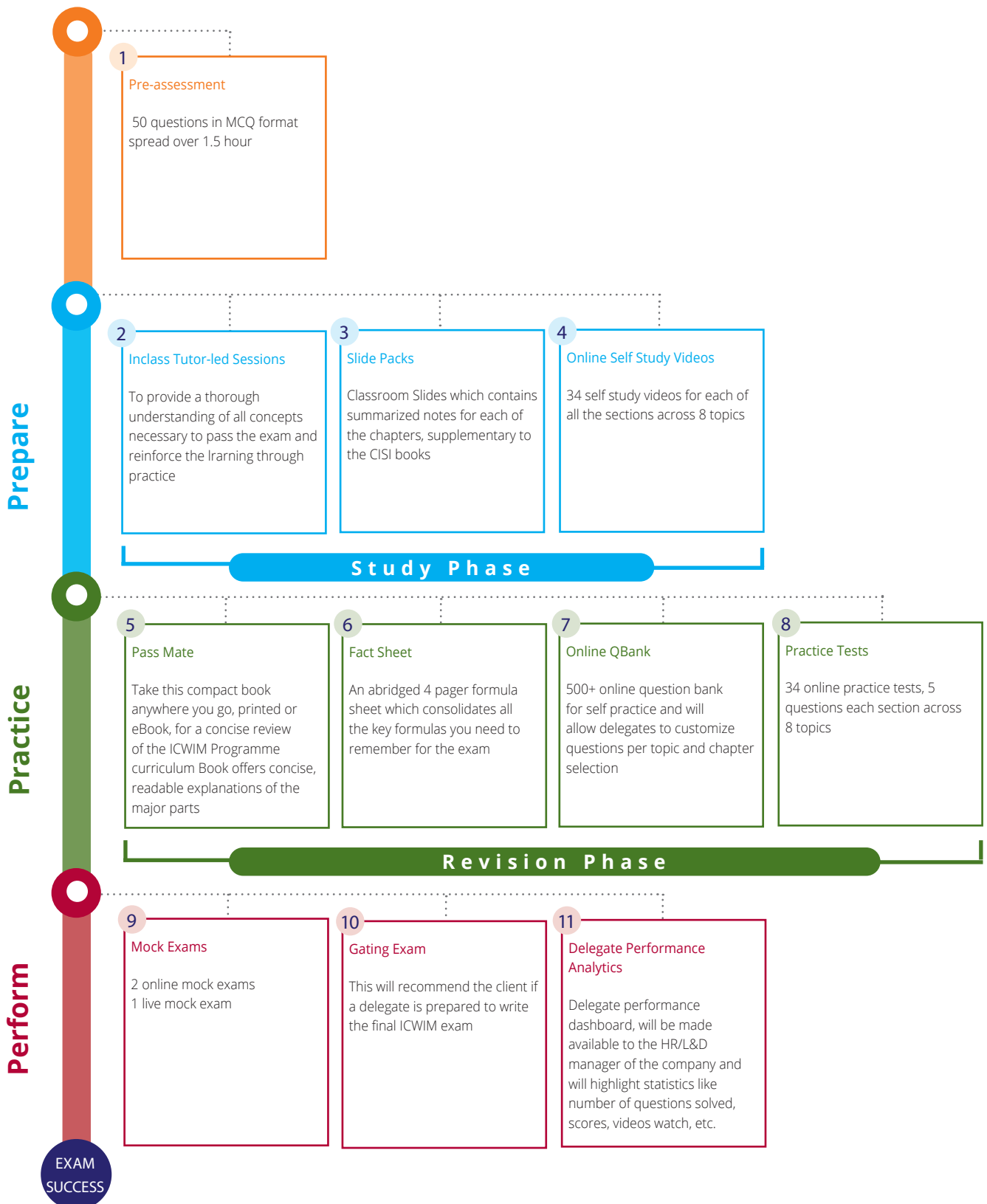
Approved learning provider

Kaplan is approved course provider for ICWIM in the Middle East by CISI (Chartered Institute for Securities and Investment)

CISI does not endorse, promote, or warrant the accuracy or quality of the products or services offered by Kaplan.

Our Complete Learning Solution

Our ICWIM exam prep solution comprises of a blended training methodology using pre and post assessments, mock exams, instructor-led preparatory and revision elements supported with a high-evolved e-learning system which is designed to be easily customised:

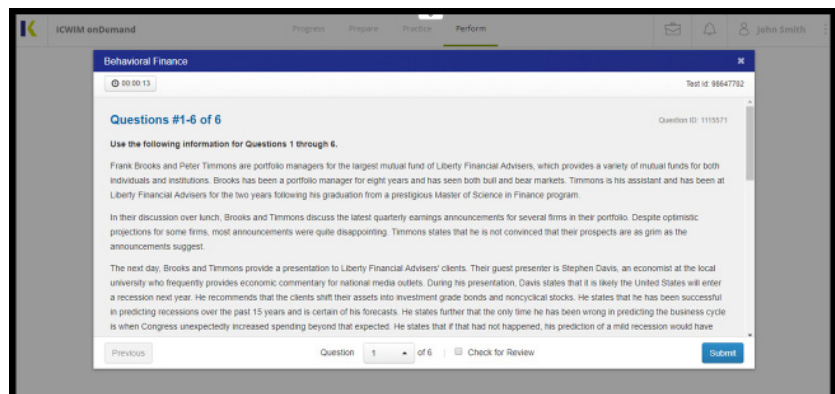
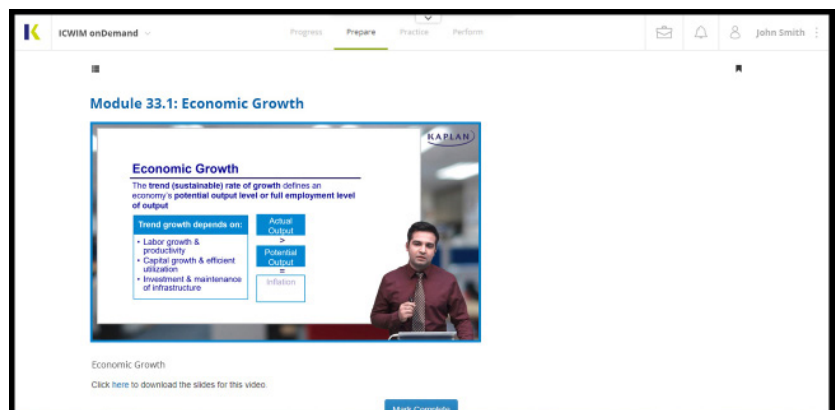
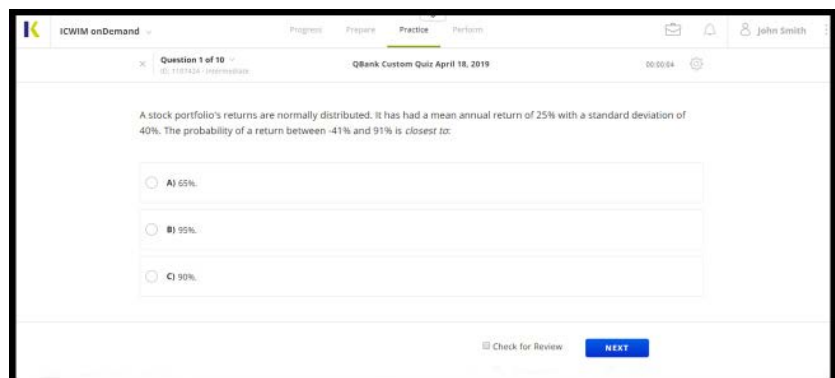
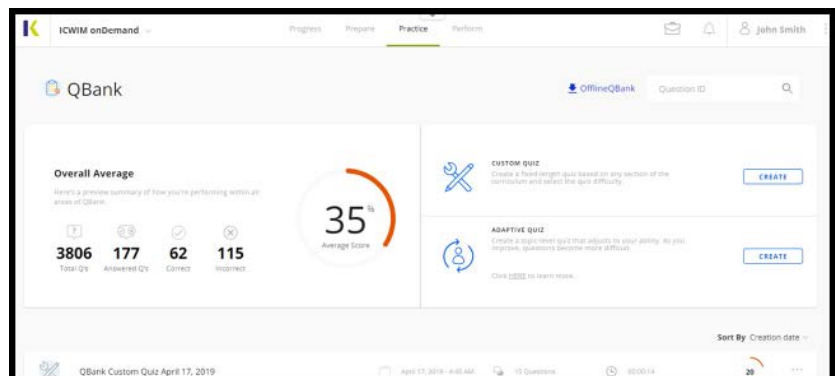


CISI: ICWIM OnDemand

Perfect if you want all your course content online and enjoy the flexibility of studying in your own time when it suits you. Of course, you also have the reassurance of being guided through all of the resources, so you know exactly what you need to complete and in what order.

What's included?

- ✔ **Online resources** comprising of onDemand videos, online mock exams, question bank and delegate performance tracking.
- ✔ **Guided by a tutor** so you know exactly what you need to complete and when. Designed to cover the whole syllabus.
- ✔ **Access to dedicated tutor** when you need it - by email support.
- ✔ **Feedback** either immediately, or from a Kaplan marker, when you complete a practice test or mock exam so you know the areas to improve on.



		ON DEMAND	TUTOR BASIC	TUTOR ENHANCED
A	SUITABILITY			
1	IDEAL DELEGATE TRAITS			
	Time available for Self Study	High	Low	Low
	Required Level of Guidance	Low	High	High
2	PRE ASSESSMENT TEST			
	50 questions in MCQ format spread over 1.5 hour	✓	✓	✓
	Ideal score	> 70	> 55	< 55
B	TRAINING			
1	EXAM PREPARATION		3 DAYS	5 DAYS
	Comprehensive Inclass training		5 topics	8 topics
	Monitored Question Solving		✓	✓
	Post Topic Review Session			✓
	Group Doubt Solving		✓	✓
	Study Planning Guidance	✓*	✓	✓
2	EXAM SIMULATION			
	34 Practice Tests	✓*	✓	✓
	2 Online Mock Exams	✓	✓	✓
	1 Live Mock Exam		✓	✓
	Inclass Review of Mock Exam			✓
C	VALUE ADDS			
	Dedicated Project Management Support		✓	✓
	Dedicated Student Relationship Support		✓	✓
	Exam Registration Support		✓	✓
	Ask the Instructor Email Support	✓	✓	✓
	WhatsApp group for Technical and Motivational Support		✓	✓
	WhatsApp Access to Trainers			✓
	32 NASBA Credits		✓	✓
D	LEARNING RESOURCES			
1	STUDY MATERIALS			
	Slide Pack	E-version	Printed	Printed
	Pass Mate	E-version	E-version	Printed
	Fact Sheet	E-version	E-version	Printed
2	E-LEARNING PORTAL			
	34 On Demand Videos	✓	✓	✓
	Online Qbank with 500+ questions	✓	✓	✓
	Performance Tracker	✓	✓	✓
E	MONITORING & FEEDBACK			
	FEEDBACK REPORT			
	Attendance		✓	✓
	Test Performance		✓	✓
	Class Participation		✓	✓
	Individual Candidate Feedback	✓	✓	✓
	Corrective Action Plan		✓	✓
	Completion Certificate from Kaplan			✓

* Available Online

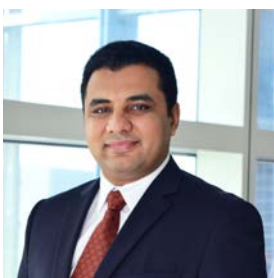
Trainer Profiles



VISHAL IYER, CFA

Director & Product Head

Over 13 years of experience in the corporate world and training in derivative strategies, working capital, cash flow and risk management.



YASIR ALI, CFA, CMA, ACCA, FRM, ACMA, CGMA

Associate Director & Product Head - Accounting & Taxation

Over 15 years of experience in implementation of foreign investment appraisal, risk management and preparing financial models.



RAHUL SONTHALIA CFA, CMA

Associate Director & Product Head - Executive Education & Financial Markets

Over 12 years of experience in the area of macro-economic research, equity research, investment banking, with specialization in financial analysis, equity valuation and Financial Modeling.



BILAL AHMAD CFA, ACCA

Trainer and Manager

Over 10 Years of experience training in the arena of Equity Valuation, Portfolio Management, Corporate Finance, Financial Management, and Financial Modeling.



SHANIN THOMAS, CFA

Senior Manager - Training

Over 6 years of training experience in the CFA program, financial modeling, business valuation, equity research, value investing, derivatives, and finance for non-finance courses.



Our Clients





QUALIFICATIONS AND CERTIFICATIONS | BEHAVIORAL AND TECHNICAL DEVELOPMENT | BLENDED PROGRAMS

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