



Private Wealth  
& Family Office  
Association



# FAMILY OFFICE & PRIVATE WEALTH - A SWISS CERTIFIED APPROACH

Are you looking to enhance your skills in operating family offices and offering private wealth services? Join our comprehensive course, PWFO **Swiss Certified** Approach to **Family Office and Private Wealth**, and gain the knowledge and expertise needed to excel in this field.

## COURSE HIGHLIGHTS

- Evolution of wealth and the concept of a family office
- Career opportunities and business aspects
- Financial inventory and high-level analysis to determine client risk profiles
- Match client goals with their financial inventory and rebalance portfolios
- Aligned with client risk profiles and lifetime cash flow requirements
- Select appropriate investment managers and service providers
- Manage ongoing data collection, input, and information processing
- Record, monitor, and report risk and return performance of investments
- Software applications, data custody, protection, and security

## KEY BENEFITS

- Elevate your status as a trusted financial strategist
- Gain practical insights and best practices from a leading Swiss expert
- Priority invitations to conferences and workshops organised by the association
- Access to a prestigious online platform with extensive collection of articles, newsletters and blogs
- Become an Associate Member of the PWFO Association upon enrolment
- Eligibility to become a Fellow Member after successful completion of the course
- Opportunity to publish and share your insights within the PWFO Association social community
- Gain the right to use the PWFO logo and 'PWFO - Swiss Certified' designation on your professional profile.
- Swiss office access and address use (Preferential rate for members)

## COURSE DETAILS



Rs. 50,000  
(MQA APPROVED)



15 JUNE 2024



Online Learning Module  
[Study at Your Time]  
Additional 3 Face to Face Sessions



LCTI, 3rd Floor, IKS Building,  
Cnr. Seeneevassen & Farquhar  
Streets, Port- Louis

## TRAINERS



### Ayoob Rawat

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(PWFO) - Swiss Certified



### Me. Tawheen Choomka

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