ANNEX 4

Master of Science in Wealth Management (MWM)
Factsheet

The Wealth Management Institute (WMI), in collaboration with Singapore Management University (SMU) and Swiss Banking School (SBS), offers the Master of Science in Wealth Management degree (MWM).

Concept

- Asia-focus with a global perspective on the latest trends in wealth management
- Leverage the experience of the three organisations - WMI, SMU and SBS
- Use relevant case studies and current industry practices as learning supplements

Programme Features

- A Masters degree awarded by SMU, and a Certificate awarded by SBS
- Asian case studies, team activities, pre-course assignments, computer-aided learning, simulations, evening talks, site visits, field trips to complement classroom learning
- One external module to be conducted at Swiss Banking School in Switzerland
- Opportunities for long or short internships with professional wealth managers
- Scholarships based on merit for select participants

Programme Duration

- 14-month programme, commences in January every year
- 5 blocks of on-campus residential studies, each of two weeks duration
- In all, students are required to complete 17 compulsory core courses (39 credits), 3 electives (4.5 credits) and 1 project (1.5 credits)

Programme Participants

- Private Bankers
- Asset Managers
- Fund Managers
- Investment Professionals
- Graduates who aspire to be wealth managers

Key Highlights of Curriculum

Modules	Description	Key Topics
Preparatory Course	Refresher on basics computer and statistical techniques	• Accounting • Economics • Finance • Quantitative techniques
Module I	Building blocks to managing wealth	• Financial Statement Analysis • Macro/ International Economics • Quantitative Methods for Investment Analysis • Capital Markets

Module II	Global wealth outlook	• Effective leadership in team oriented organizations • Developing and implementing business strategies • International wealth and tax planning
Module III	Deepening wealth knowledge	• Equity Investments • Corporate Finance • Fixed Income Analysis
Module IV	Specialisation within wealth management	<u>Core topics</u> • Financial planning for individuals and institutions • Alternative investment products • Derivative investments <u>Electives (Private banking)</u> • Marketing for financial industry • Tax & estate planning • Client Relationship management <u>Electives (Asset Management)</u> • Private equity and real estate • Hedge funds (including trading strategies) • Structured products
Module V	Wealth expansion and development	• Portfolio management • Ethics • Risk management • Law and Financial legal system • Graduate project