

The Certified International Wealth Manager Designation:
**A NEW CLASS OF ADVISOR FOR
A HIGHER LEVEL OF WEALTH MANAGEMENT**

Working with a Certified International Wealth Manager (CIWM) is
a relationship based on your needs.



Partner with a CIWM today ▶

Name

Phone

Email

A Certified International Wealth Manager can help you manage your entire wealth picture and ensure you have a plan that grows with you – to meet your life goals

The role of a CIWM is to:

- » Clarify what's important to you and your family, your life goals, plans, concerns, and opportunities.
- » Integrate all areas of your financial life to ensure you have the right financial strategies in place to achieve your unique goals.
- » Develop your personal wealth management plan by providing customized choices and solutions to fit your individual, family or business needs.
- » Collaborate with outside professionals to support your wealth plan, including lawyers, accountants, trust specialists and estate planners as needed.
- » Utilize in-depth expertise in areas such as tax consultation, family trust and holding company advice, succession planning, post retirement income plans, and other wealth management solutions as part of the planning process.

The CIWM designation is awarded only to the most qualified

All designates need to hold an accredited financial planning designation and have satisfied CSI's demanding course requirements for this designation. This includes the completion of a complex client case study simulation and the development of a comprehensive wealth management plan.

Rigorous requirements to maintain the CIWM designation

All CIWM designation holders must meet continuing education requirements, and adhere to a strict code of ethics.

Sit down with a CIWM accredited Advisor to talk about your goals and aspirations.

The CIWM designation is awarded by the Canadian Securities Institute, in partnership with AIWM.

Founded in 1970, CSI has helped more than 750,000 financial professionals earn their credentials through its courses and programs. The AIWM is a global non-profit association established to encourage, promote and strengthen global education in the wealth management/private banking industry.

For more information, please visit www.ciwm.ca