

ATTENTION: The Editor

Press Release

CHARTERED WEALTH MANAGER® CERTIFICATION GETS ACCREDITED UNDER THE SEBI (INVESTMENT ADVISERS) REGULATIONS, 2013

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A *AFM India premier global certification in Wealth Management & Financial Advisory Services i.e. CHARTERED WEALTH MANAGER®, gets accreditation from NISM under the SEBI (INVESTMENT ADVISERS) REGULATIONS, 2013*

American Academy of Financial Management India Private Limited, AAFM India (AAFMI) was established under the banner of American Academy of Financial Management® (AAFMI®), USA as its Indian Chapter with the objective to work in the Financial Services Domain as a Standard Setting Body in India to promote Wealth Management and Financial Advisory Services in the country to highlight the key trends in wealth management industry, key challenges faced by wealth management firms and financial advisors, and how a customer centric wealth management solution can help them address many of these challenges

The American Academy of Financial Management (AAFMI, USA) Board of Standards™ was founded in 1996, via a merger between the American Academy of Financial Management & Analysts (AAFMA) and the Founders Advisory Committee of the Original Tax and Estate Planning Law Review™. AAFMI, USA is based out in Colorado Springs, USA, a 17 years old globally renowned organization having offices in 17 countries, 3,00,000 + certificant's globally for various certification offered including Chartered Wealth Manager® (CWM®).

American Academy of Financial Management India Private Limited (AAFMI India) is responsible for establishing Curriculum Design, Certification of membership and licensing standards in India and offers Certifications, Charters and Designations which are globally recognized in Wealth Management, Risk Management, and as a Financial Planner, Financial Analyst, and Economics in association with International Board of Standards of the American Academy of Financial Management®, USA including the prestigious and highest designation globally recognized in the Field of Wealth Management "CHARTERED WEALTH MANAGER®" (CWM®).

AAFMI India foresee the contemporary times of Indian Financial Advisory Services Industry as a very important transition phase where new business models needs to be innovated where the prime focus being the "Client" like Fee Based Model (Continuous Client Retention), Transactional Relationship Model (One Time Advice Activity) or a Model bundled with both. The establishment of AAFMI India stands committed to focus on to fill the gap between the **Comprehensive Advice & the Client Need** by offering more of international standard professional certifications. AAFMI India believes that the contemporary demand of the Industry is to have more number of "Qualified Advisors" having the right skill set and knowledge required to provide the "Quality & Comprehensive Advise".

The Chartered Wealth Manager® a global designation in Wealth Management being offered in India in association with local Authorized Education Providers who are carefully selected by AAFMI India seeing their commitment to maintaining quality standards of education delivery in India. The CWM® program can be undertaken by individuals like students aspiring their career in financial services, Professionals, Independent Financial Advisors (IFA's), Chartered Accountants (CA's), etc. who want to learn and attain the international standards of wealth management and financial advisory services.

CHARTERED WEALTH MANAGER® (CWM®) is unique and the only Wealth Management certification in India. The CWM® focuses on developing relationship management, sales, communication and core financial advisory skills to equip Wealth Management Professionals. This certification comprehensively deals with all the aspects of wealth management like Investment Strategies, Equity Analysis, Life Cycle Management, PMS, Intergenerational Wealth Transfer, Relationship Management, Behavioral Finance, Alternative Products, Real Estate Valuation and Global Taxation in order to meet the recent mandatory requirement posted by the financial services industry towards the **skillful and knowledgeable candidates** in the field of personal financial advisory services including wealth



management. This certification enables the candidates to meet the current skill set needed by the industry and **stand out of the crowd**.

*The CWM® certification is issued by **American Academy of Financial Management®**, USA after meeting the eligibility and examination criterion of the AAFM® Board. The CWM® professionals develop theoretical and practical Wealth Management Knowledge by completing the comprehensive course of study.*

In case of any query please feel free to contact me.

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