

The curriculum of CWM is divided into 2 levels:-

Level 1:- Foundation Level Consisting of 9 units

This level is of 115 minutes with 70 questions. It has three sections A, B, and C. Section A has 30 questions with 2 marks each, section B has 20 questions with 2 marks each, and section C has 20 questions with 4 marks each. Total marks for this level is 150 and passing marks is 50%

Unit No.	Name of the Unit
UNIT 1	Overview of Global Financial System
UNIT 2	Concept of Wealth Management
UNIT 3	Life Cycle Management
UNIT 4	Investment Vehicles of Wealth Management
UNIT 5	Measuring Investment Returns
UNIT 6	Managing Investment Risk
UNIT 7	Role of Wealth Management in Banking
UNIT 8	Loan & Debt Management
UNIT 9	Intergenerational Wealth Transfer

Level 2:- Advanced Level Consisting of 9 units

This level is of 175 minutes with 90 questions. It has three sections A, B, and C. Section A has 40 questions with 1 mark each, section B has 30 questions with 2 marks each, and section C has 20 questions with 5 marks each. Total marks for this level is 200 and passing marks is 50%

Unit No.	Name of the Unit
UNIT 10	Equity Analysis
UNIT 11	Use of Alternative Products in Wealth Management
UNIT 12	Use of Behavioral Finance in Wealth Management
UNIT 13	Real Estate Valuation and Analysis
UNIT 14	Relationship Management by a Wealth Manager
UNIT 15	International Taxation
UNIT 16	Portfolio Management Strategies
UNIT 17	Wealth Management Planning
UNIT 18	Advanced Wealth Management