



AMERICAN ACADEMY OF FINANCIAL MANAGEMENT®

International Board of Standards

BUILDING GLOBAL LEADER'S IN FINANCE



AMERICAN ACADEMY OF FINANCIAL MANAGEMENT® (AAFM®, USA)

AAFM® is a renowned Global name in financial education with presence in 151+ Countries and over 300000 Certificants Globally which is committed to make quality education available to everyone regardless of their geographical location and age limit. AAFM® offers exclusive certified designations, charters, and master's certification to candidates who meet the high standards. AAFM® now has representative offices in the US World Trade Center N.O. Center, Hong Kong, Beijing, India, Dubai, Kuwait, Latin America and South America, Singapore, The Caribbean, Europe, and more.



ABOUT AAFM® INDIA

American Academy of Financial Management India Private Limited, AAFM India (AAFMI) was established under the banner of American Academy of Financial Management® (AAFM®), USA and started its operation in the year 2011 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.

AAFM India is responsible for establishing Curriculum Design, Certification of membership and licensing standards in India. AAFM India offers various Certifications, Designations and other Educational Programs offered by AAFM®.

BENEFITS OF AAFM® CERTIFICATION

<p>01</p> <p>BOOST YOUR CAREER</p> <p>Beat the Competition Get that Promotion and Be a Winner !</p>	<p>02</p> <p>STAND OUT TO TOP EMPLOYERS</p> <p>World's Leading Companies and Banks Hire AAFM® Certifications</p>	<p>03</p> <p>GET UNMATCHED EXPERTISE</p> <p>Knowledge You Need ! Skills the World Wants !</p>	<p>04</p> <p>GLOBAL PASSPORT</p> <p>International Job Opportunities Certifications Valid in 151+ Countries</p>	<p>05</p> <p>GLOBAL NETWORK</p> <p>Join the Community of of 3,00,000 AAFM® Professionals Worldwide</p>
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CHARTERED WEALTH MANAGER® (CWM®) is unique and the only Wealth Management certification in India. This certification comprehensively deals with all the aspects of wealth management like Investment Strategies, Life Cycle Management, Intergenerational Wealth Transfer, Relationship Management, Behavioural Finance, Alternative Products, Real Estate Valuation and Global Taxation.

**CWM ACCREDITATION BY NISM
 (Under SEBI - Investment Advisers Regulations, 2013)**

The Chartered Wealth Manager® (CWM®) Certification is the 1st Certification in India to be Accredited by National Institute of Securities Market (NISM) under the Securities Exchange Board of India (SEBI) Investment Advisers Regulations 2013.

CURRICULUM

- Book 1 – Introduction to Wealth Management
- Book 2 – Investment Management & Planning
- Book 3 – Products in Wealth Management
- Book 4 – Laws on Wealth Management
- Book 5 – Applied Wealth Management



- Book 1 – Asset Classes of Wealth Management
- Book 2 – Practice of Wealth Management
- Book 3 – Tools of Wealth Management
- Book 4 – Applied Wealth Management



EXAMINATION

Name of Examination	Duration	Unit Covered	No. of Questions	Total Marks	Passing %
CWM_Level_1	2 Hours	1 to 10	55	170	50%
CWM_Level_2	3 Hours	1 to 10	85	200	50%

- No Negative Marking | Examination Type - MCQ's (Objective)
- Candidates Having More than 3 Years of Work Experience are exempted from Level 1 Examination and can directly write Level 2 Examination to gain CWM chartered Designation.



The CHARTERED TRUST & ESTATE PLANNER™ (CTEP™) is unique and the only Trust and Estate Planning certification in India. This certification comprehensively deals with all the aspects of Estate Planning And Trust Planning like Asset Protection, Intergenerational Wealth Transfer, Succession Planning, Creation of Trusts, Trust Management, International Trust Structures, Philanthropic Planning, Cross Border Estate Planning, Maintenance of Dependents and Estate Tax Planning issues Globally. The participants get in depth view of Wills, Power of Attorneys and Succession Laws etc.

CURRICULUM

- Unit 1 - Introduction to Estate Planning
- Unit 2 - Legalities of Succession Planning
- Unit 3 - Indian Taxation Laws
- Unit 4 - Trust Planning in India
- Unit 5 - Advanced Estate and Succession Planning
- Unit 6 - International Trust and Estate Planning

EXAMINATION

Name of Examination	Duration	Unit Covered	No. of Questions	Total Marks	Passing %
Only One Exam	2 Hour	1 to 6	80	150	50%

- No Negative Marking | Examination Type - MCQ's (Objective)

CTEP



The Accredited Financial Analyst® (AFA®) designation serves as a benchmark of competency in the Finance Analysis & Research profession and is recognized as the leading credential in corporate worldwide. The Accredited Financial Analyst® Certificate Program is designed to develop the skills required by Financial Analysts, Research Analyst and Equity Analysts to execute critical functions related to Financial Statement Analysis, Corporate Finance, Equity Research, Investment Analysis and Financial Modelling.

CURRICULUM

- Unit 1 : Introduction to Financial Markets
- Unit 2 : Quantitative Techniques and Methods
- Unit 3 : Financial Statement Analysis
- Unit 4 : Corporate Finance
- Unit 5 : Fixed Income Security Analysis

- Unit 6 : Equity Valuation
- Unit 7 : Derivatives and Alternate Investments
- Unit 8 : Portfolio Management Strategies
- Unit 9 : Behavioural Finance
- Unit 10 : Advanced Financial Analysis



EXAMINATION

Name of Examination	Duration	Unit Covered	No. of Questions	Total Marks	Passing %
AFA_Level_1	115 Minutes	1 to 5	80	170	50%
AFA_Level_2	175 Minutes	6 to 10	90	200	50%

- No Negative Marking



The Chartered Economist™ Ch.E™ Designation program is designed by leading economists globally to bridge the gap between what is learned in an academic setting and the knowledge needed to succeed as a practitioner.

If you practice economics in your work or want to make a career in 'Economics' earning the Chartered Economist™ Designation enhances your skills & knowledge in your chosen domain area of Economics. It serves to verify your achievements. The designation holders enjoy distinct professional advantages and are considered as 'Leaders in the Field of Economics'.

1. Fundamentals of Economics: Micro & Macro Economics
2. Econometrics & Industrial Economics
3. Industrial Economics
4. International Economics – I
5. International Economics – II



EXAMINATION

Name of Examination	Duration	Unit Covered	No. of Questions	Total Marks	Passing %
Ch.E_Level_1	2 Hours	1 to 5	55	170	50%

- No Negative Marking | Examination Type - MCQ's (Objective)
- Frequency of Examination: Monthly

All examination will be held at the centre of Pearson Vue having more than 500 Test Centers across India.

1. Chartered Economic Policy Analyst (CEPA™)
2. Chartered Energy Economist (CEE™)
3. Chartered Financial Economist (CFE™)
4. Chartered Health Economist (CHE™)
5. Chartered Industrial Economist (CIE™)
6. Chartered Managerial Economist (CME™)
7. Chartered Petroleum Economist (CPE™)



American Academy of Financial management® India

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