What is the ICWIM?

Growing prosperity is increasing the demand for private banking services, whilst the turmoil in the financial markets demonstrates the need for robust and focused solutions to help clients withstand market volatility and preserve their wealth.

ICWIM covers the essentials of financial planning, private client asset management, fund management, advisory functions and investment analysis from a global perspective. You will learn about the range of assets and investment products available in the market and you will gain the knowledge to provide financial advice and find appropriate solutions to meet the investment, retirement and protection planning needs for your clients. ICWIM is suitable for individuals engaged in private client asset management and fund accounting.

Who should study the qualification?

The qualification’s broad focus on wealth and investment management makes it suitable for a wide audience - from new entrants to financial services to professionals already working in the industry who may be interested in diversifying into wealth management. It is an ideal alternative for staff working in wealth management roles who need to demonstrate competence through the achievement of a benchmark qualification and who want to develop an understanding of how to deliver wealth management advice.

The ICWIM meets the needs of those firms who want to ensure that staff are able to provide high-quality advice and the qualification can be included into staff induction programmes.

Ofqual approval

ICWIM is regulated by Ofqual (on its Regulated Qualifications Framework) as CISI Level 3 Certificate In Wealth & Investment Management. The Total Qualification Time for this qualification is 154 hours. Visit cisi.org/Ofqual. On the European Qualifications Framework, this equates to a level 4 qualification. For further information visit cisi.org/eqf

Key features

- Prepare for a career in wealth management – ICWIM provides a comprehensive introduction to financial planning, industry regulation, investment analysis and lifetime financial provision
- First step in the CISI's wealth/retail pathway – you can build upon this qualification by progressing to higher level CISI wealth/retail qualifications
- Available to all – the qualification has no entry requirements
- Globally focused – provides knowledge of the key wealth management principles without focusing specifically on one jurisdiction
- Free CISI Student membership – become associated with a Chartered professional body and take advantage of an extensive range of benefits
- ACSI designatory letters

Accredited by
The CISI's purpose is “to champion lifelong learning and integrity, raising individual standards of knowledge, skills and behaviour globally to enhance public trust and confidence in financial services.”