

Remote exams
now available

International Certificate in Wealth and Investment Management (ICWIM) India

Key features

- Provides a comprehensive introduction to Indian financial services, regulation of markets and investment products.
- **Available to all** – the qualification has no entry requirements
- **Client focused content**
- **First step in the CISI's global wealth / retail pathway** – you can build upon this qualification by progressing to higher level CISI wealth / retail qualifications
- **Examinable by computer based testing**
- **Free CISI Student membership**
- **ACSI designatory letters**

What is the International Certificate in Wealth and Investment Management (ICWIM) India?

ICWIM India provides an introduction to Indian financial services, regulation of markets and investment products.

Who should study this qualification?

This qualification is suited to existing investment financial advisors, wealth advisors and wealth management professionals.

University partners



The qualification consists of two exams:

Wealth and Investment Management (India)

1 hour exam consisting of 50 questions

The Wealth and Investment Management (India) unit provides an overview of financial services in India from a macroeconomic perspective, introducing candidates to the complex nature of financial services products and regulation of markets in India.

The exam explores Indian savings, investment products and financial planning calculations and tools. It also covers the key aspects of pensions, financial protection, taxation and estate planning in India.

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International Certificate in Wealth and Investment Management

2 hours exam consisting of 100 questions

The International Certificate in Wealth and Investment Management unit covers the essentials of financial planning, private client asset management, fund management, advisory functions and investment analysis from a global perspective.

The exam covers the range of assets and investment products available in the market. Candidates will gain the knowledge to provide financial advice and find appropriate solutions to meet the investment, retirement and protection planning needs of clients.

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International Certificate in Wealth and Investment Management (ICWIM) India

Studying for the International Certificate in Wealth & Investment Management (ICWIM) India

You can self-study for the qualification using the CISI learning manuals. The CISI's learning manual policy requires, where available, the most up-to-date CISI learning manual to be purchased when booking an exam, including by an Accredited Training Partner (ATP) on your behalf. To find an ATP near you visit cisi.org/atp. Candidates in India will receive the most up-to-date learning manual for that subject in PDF format and this is included in the international exam price.

Assessment

The qualification is assessed via two multiple-choice question exams and the pass mark is 70% for both exams. The exams are delivered by Computer Based Testing (CBT), ensuring flexible scheduling, instant results and ease of completing the exam on screen.

Test centres are available across India including, Mumbai, Hyderabad and Chennai. Visit cisi.org/cbt to find your nearest CBT test centre.

Online: cisi.org/icwimindia

By phone: +65 64385007

Via email: icwimindia@cisi.org

Don't forget to set your results preferences afterwards at cisi.org/resultsdashboard.

Visit cisi.org/prices for current prices.

Next steps

CISI membership

If you are not currently a CISI member you will receive free CISI Student membership whilst you study and have access to a wide range of benefits. Upon successful completion of the qualification you will be eligible to become an Associate member of the Institute and you will be entitled to use the designatory letters, ACSI. CISI membership enables you to develop your career, increase your competence and maintain the highest standards of integrity. You can ultimately strive to achieve personal chartered status, the pinnacle of CISI membership. Visit cisi.org/membership

Higher level qualifications

- Certificate in International Advanced Wealth Management
- Chartered Wealth Manager Qualification - the qualification offers wealth managers (including discretionary portfolio managers, private bankers, IFAs and others dealing with high net worth clients) a postgraduate level specialist qualification encompassing the breadth of knowledge needed to provide a high quality service to clients. cisi.org/cwmq