Certificate in Wealth Management Advisory

Welcome to

Wealth Management Advisory

Earn 15 PD Hours

Elevate your financial expertise with our comprehensive Wealth Management Advisory Certificate tailored specifically for CPAs and finance professionals. This program provides a strategic and in-depth exploration of key wealth management principles, equipping learners with the skills needed to navigate the complexities of wealth planning, investment management and client advisory services.

Join us on the journey to becoming a well-rounded wealth management professional professional. Unlock new opportunities for your career and make a meaningful impact on your client's financial success.

Note: This on-demand certificate features recordings from the instructor-led version of this program along with significant new and updated content. If you attended the instructor led wealth management advisory certificate in December 2024, please do not register for this on-demand version.

Delivery Methods: On Demand Learning

Key Takeaways

During this course, participants will:

- Gain tools to develop sound financial habits that will aid you in building a strong financial future.
- Understand the particular complexities of dealing with an estate owning a business.
- Discover how risk tolerances and biases affect financial decision-making.
- Understand how to advise expatriates on their personal tax needs.
- Discover how to align client portfolios with ESG principles while addressing economic and environmental challenges.

Who Will Benefit

This program is designed for CPAs and finance professionals seeking to enhance their proficiency in wealth management, expand their service offerings, and provide comprehensive financial solutions to clients. Examples of professions who would benefit include:

- Financial Advisors
- Portfolio Managers
- Financial Analysts
- Investment Analysts
- Private bankers

Whether you are looking to specialize in wealth management or broaden your skill set, this certificate program offers valuable insights and practical skills to excel in the dynamic field of wealth management.

Earn a Digital Badge

Our new collection of digital badges can be earned through the completion of any of our certificate programs offered in our professional development catalogue. Collect these digital badges to add to your website, social profiles, email signature and more. These badges are an easy way to visually communicate your skills and accomplishments to your peers and network. Digital badges will be awarded based on course completion requirements.

Certificate Outline

Module 1

Financial Literacy

How to guide your clients through financial education.

Module 2

Financial Planning

Learn the knowledge and skills to complete a complex financial plan for your clients.

Module 3

Behavioural Finance

Biases that factor into your financial and business decision making.

Module 4

Personal Estate Planning: Is it an Honour or a Burden?

Helping your clients choose an Executor.

Module 5

Estate Planning for Businesses: How to Prep for the Transition

The roles, duties, and risks of being an Executor.

Module 6

Finance / Tax Planning for Cross Border

Educating and advising expatriates on their personal tax needs.

Module 7

Strategic Insurance Planning for Your High Net Worth Clients

Module 8

Maximizing Your Life Insurance

- What is a life settlement? History of life settlements.
- Why do individuals want to utilize or sell their policies?
- What are the options?

Module 9

Investing Options

Debt vs. Equity

Module 10

Capitalizing on Buying Out Private Companies

- How to identify an ideal market niche for investing in?
- What are key metrics for identifying ideal businesses?
- How do you effectively transition ownership?

Module 11

Investing in Music Royalties

Learn how to diversify client portfolios with stable, alternative income streams. Highlight the role of streaming-driven growth in revenue stability.

Module 12

Investing in Farmland

Gain insights into farmland as a high-performing, low correlation asset class. Learn strategies to support clients with tax-efficient farmland transitions.

Module 13

Investing in Clean Energy / How to Recognize Opportunities Training

Explore clean energy investments as stable, low-risk options for client portfolios. Understand tax benefits tied to renewable energy investments.

Module 14

Importance of Referrals

Module 15

Business Development

Module 16

Integrating Wealth Management

Why clients need a professional accountant on their wealth management team.

WS | WEALTH STEWARDS

ABOUT YOUR INSTRUCTORS

Wealth Stewards

Wealth Stewards has been an innovator in the integration of wealth management services with traditional CPA accounting and tax services. Instructors for this program include:

Ruby Lougheed
Director of Business Development

Paul Tyers
Managing Director and Portfolio Manager

Bob Simpson
Vice President Portfolio Strategy

Promod Sharma
President of Taxevity

Jeevan Sharma
CFP Manager of Client Services Taxevity

Kent Willmore
President and Founder of AGinvest Farmland Properties Canada Inc

Teodor Tomescu
BEng

Haley Thomas
CFP, CIM

Rob Stein
President of Skyline Energy

Marizaan Davids
BA (Accounting), Honours BBM

Peggy Tyers
Vice President Business Development

Michael Ruta
Executive Director, Alchemy Capital Partners

Akua Carmichael
Vice President, Estate Planning & Services

David Vankka
President & Partner at ICM Asset Management

Jim Herrig
Partner at HKFS Honkemp Kruger Financial Services

Have Questions? Speak to an Advisor.

To speak to one of our advisors, please fill out this form.

Need Approval to Attend?

If you need approval to attend the session, please fill out the Employer Request Letter.

CPA ONTARIO