Stewarding Wealth for The Next Generation

Rooted in Wisdom & Guided by Faith

Certified Christian Wealth Manager™

This blended learning journey builds upon the eCWMA ™ (Executive Certified Wealth Management Advisor) professional certification, further enriched with biblical principles — offering a faith-integrated approach to wealth management and High-Net-Worth client advisory, equipping wealth managers for both professional excellence and Kingdom impact.

Learning Journey

3-Weeks eLearning
3 weeks, asynchronous
(6 hours/week)

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3-Day Workshop
9am – 6pm (in-person)

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1-Day Journey of Generosity
9am – 6pm (in-person)

Certified Christian Wealth Manager

CCWM™
Certified Christian Wealth Manager

A transformative certification empowering Christian financial professionals in advising HNW clients with excellence, integrating advanced wealth strategies with biblical principles of stewardship, generosity, and eternal purpose.

Key Learning Outcomes

- Identify opportunities in the HNW ecosystem (family offices, external asset managers, private banks) & the dynamics of WealthTech
- My Personal Value Proposition
- Finding HNW clients & how to prospect them successfully
- Integrate biblical stewardship into HNW investment strategies & wealth planning

3-Weeks eLearning

Asynchronous eLearning exploring biblical stewardship, generosity, and faith-driven finance

- Exactly, what is faith-driven investing all about? How is it different from "regular" investing?
- Biblical principles of wealth management — exploring stewardship, generosity, and financial responsibility in a Christian context
- Integrating faith and finance — how to align financial practices with Christian values and ethics
- Investment strategies from a Christian perspective — ethical and social impact investing, and aligning portfolios with faith
- Economic principles and biblical wisdom — understanding economic systems through a biblical lens
- Navigating market volatility — strategies for managing investments during economic uncertainty while maintaining faith

3-Day Workshop

Day 1

Private Banking & Wealth Management

Industry Dynamics

Gain deeper understanding on Private Banking and current trends' impact on clients, and how to position your personal value proposition effectively.

Day 2

Private Banking & Wealth Management

Conversations

Build rapport with HNW clients and add value by understanding their needs through strategic frameworks and client engagements skills.

Day 3

Private Banking & Wealth Management

Investment Strategies

Offer tailored investment strategy and comprehensive wealth planning to HNW clients according to their unique needs and wealth season.

1-Day Journey of Generosity

One day experience that helps participants explore Biblical generosity and how to live and give with eternal purpose.

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Program Fee S$ 2,509 (after GST)

- 70% subsidy for SG citizen 40 yrs old & above
- 30% subsidy for SG citizen 21-39 yrs old & PR
- Includes a S$220 certification fee from ISOFP

The Certified Christian Wealth Manager professional certification is awarded by the International Society of Financial Professionals.

ISOFP International Society of Financial Professionals

The leading provider of training to UBS, Bank Julius Baer, LGT, Bank of Singapore, DBS Private Bank, UOB Private Bank & other wealth management firms.

momenta>> leadersdrivingperformance

Up to 70% Funding for Singaporean & PR

IBF The Institute of Banking & Finance Singapore

Certified Christian Wealth Manager

Day 1 (in-person Workshop)

Private Banking & Wealth Management

Industry Dynamic

Workshop 1
Private Banking & Wealth Management
Industry Dynamic

Workshop 2
Private Banking & Wealth Management
Conversation

Workshop 3
Private Banking & Wealth Management
Investment Strategies

Learning Objective (Faith-Integrated)

- **Clarify your God-given Personal Value Proposition** and learn how to position it wisely and purposefully in prospect and client conversations
- **Gain insight into current Private Banking trends** and how they shape client expectations — so you can serve with foresight, integrity, and relevance

Agenda

Private Banking Insights on the Wealth Management Ecosystem
Exploring the marketplace through the lens of biblical stewardship

Topics Covered

- **The Wealth Management World: Private Banking, Family Offices, and External Asset Managers**
  Understanding the systems where modern stewards operate
- **Analyse, Synthesize & Present (ASP)**
  Sharpening discernment and clarity in decision-making
- **Current Trends in Wealth Management**
  Reading the times, acting with wisdom (1 Chronicles 12:32)
- **Macroeconomics & House View**
  Interpreting the financial landscape with insight and prudence
- **Top-Down Approach**
  Seeing from the 30,000-foot view — strategic vision in stewardship
- **Bottom-Up Approach**
  Understanding ground realities — being faithful with little, faithful with much (Luke 16:10)
- **Personal Value Proposition (PVP)**
  Clarifying your calling and distinct role in wealth advisory as a Kingdom-minded professional
- **Q&A Session**
  Engaging in peer sharpening (Proverbs 27:17)
- **Quiz Assessment**
  Reflecting on knowledge, wisdom, and readiness to serve clients with integrity

Certified Christian Wealth Manager

Day 2 (in-person Workshop)

Private Banking & Wealth Management Conversations

Workshop 1
Private Banking & Wealth Management
Industry Dynamic

Workshop 2
Private Banking & Wealth Management
Conversation

Workshop 3
Private Banking & Wealth Management
Investment Strategies

Learning Objective (Faith-Integrated)

- **Engage High-Net-Worth clients with confidence, humility, and integrity** — reflecting Christ-centred relational wisdom
- **Uncover deeper needs and desires** to add real value — listening with discernment and serving with purpose (Proverbs 20:5, Philippians 2:4)

Agenda

Strategic Conversations & Stewardship: Engaging the Wealthy with Wisdom and Purpose

Bridge financial goals with faith-centred legacy planning through values-based, purpose-driven wealth conversations

Topics Covered

- **The 3 Types of Client Conversations: From Transactional to Transformational — serving beyond the deal**
  - **Transactional** — *Addressing immediate needs with honesty (Proverbs 11:1)*
  - **Problem – Centric** — *Providing clarity and solutions in times of uncertainty (James 1:5)*
  - **Strategic** — *Asking with discernment to understand the client's deeper story (Proverbs 20:5)*
- **7 Steps in Prospecting High-Net-Worth Individuals**
  Pursuing relationships with intentionality and integrity (Colossians 4:5-6)
- **Building Trust**
  Trust is earned through faithfulness (Luke 16:10)
- **The Strategic Questioning Loop**
  Listening and asking with wisdom to understand context and calling
  — A biblical approach to consultative engagement (Proverbs 18:13, Proverbs 20:5)
- **Strategic Questioning Bank (HCF)**
  Using questions to explore the client's journey in Home, Career, and Financial stewardship
  — "Out of the overflow of the heart the mouth speaks" (Luke 6:45)
- **Life & Wealth Seasons: Recognizing the biblical rhythm of stewardship across five wealth seasons**
  - **Wealth Creation** — *Rooted in calling and diligence (Genesis 1:28, Proverbs 14:23)*
  - **Wealth Growth** — *Multiplying wisely with faith and strategy (Matthew 25:14–30)*
  - **Wealth Accumulation** — *Managing increase with humility and gratitude (Deuteronomy 8:18)*
  - **Wealth Preservation** — *Safeguarding wealth with discernment (Proverbs 21:20)*
  - **Wealth Transfer** — *Generational legacy and kingdom impact (Proverbs 13:22)*
- **7 Types of Wealthy Clients**
  Understanding who you're serving to meet them with grace and relevance
- **Listening for Clues & Cues**
  "Be quick to listen…" — Learning to hear what is said and unsaid (James 1:19)
- **Role-Plays**
  Practice walking in wisdom and empathy (Ephesians 5:15–16)
- **Question & Answer Session**
  Iron sharpens iron (Proverbs 27:17)
- **Quiz Assessment**
  Reflecting and evaluating readiness to serve faithfully and skilfully

Certified Christian Wealth Manager

Day 3 (in-person Workshop)

Private Banking & Wealth Management

Investment Strategies

Workshop 1
Private Banking & Wealth Management
Industry Dynamic

Workshop 2
Private Banking & Wealth Management
Conversation

Workshop 3
Private Banking & Wealth Management
Investment Strategies

Learning Objective (Faith-Integrated)

- **Steward financial wisdom and technical excellence** — applying Biblical principles to design investment strategies with wisdom and purpose, aligned to clients' goals and values (Matthew 25:14-30)
- **Communicate advice with clarity, courage, and grace** — becoming a trustworthy advisor who helps client steward wealth for impact – not just returns – with eternal significance (1 Timothy 6:17–19)

Agenda

Financial Wisdom & Stewardship in Portfolio Advisory

Integrating behavioral insights, investment fundamentals, and client engagement strategies

Topics Covered

- **Behavioral Finance & Stewardship Biases**
  Understanding how emotions and cognitive patterns impact client decision-making — and how to guide them wisely (Proverbs 3:5-6)
- **Foundations of Financial Instruments**
  - **Cash & Liquidity** — *Managing resources prudently*
  - **Bonds** — *Income and capital preservation*
  - **Equities** — *Growth and ownership*
  - **Alternative Investments** — *Diversification beyond the traditional asset allocation*
  - **Social Impact Investing**
- **Objection Handling: The 4 Es Framework**
  Equip, Empathize, Explore, and Encourage — Responding to client concerns with clarity and care
- **Core-Satellite Investment Strategy**
  Designing balanced portfolios with a stewardship mindset
- **Strategic & Tactical Asset Allocation (SAA/TAA)**
  Aligning long-term goals with market opportunities
- **Asset Allocation & Diversification Principles**
  "Divide your portion to seven, or even to eight…" — Applying the wisdom of stewarding resources (Ecclesiastes 11:2)
- **Role-Play**
  Practicing the art of confident, values-based portfolio advisory
- **Q&A Session**
  Engaging real-time scenarios and practical application
- **Quiz Assessment**
  Evaluating comprehension and readiness to advise with both skill and conviction

Biblically Rooted. Marketplace Relevant.

This course is rooted in sound biblical principles and thoughtfully designed to integrate faith with financial wisdom. It has been validated by **Dr. Carl Thong** — a marketplace theologian and ministry leader.

- Dr. Thong holds a Doctor of Ministry in Strategic Leadership from Corban University and a Masters in Theological Studies from the University of Northwestern – St. Paul.
- He serves on the Theological Education Board of the Anglican Diocese of Singapore and is the Dean of the School of Marketplace & Society at St. Peter's Hall. He is the Priest Warden at All Saints English Congregation.
- Dr. Thong serves as Chairman of TrustBridge Global, a Christian donor–advised fund headquartered in Switzerland, as well as Co-Chair of Generosity Path, a global ministry dedicated to advancing biblical generosity.
- Dr. Thong is a professor in the Master of Science in Wealth Management program at Singapore Management University, where he teaches and guides future leaders in the private wealth sector.
- With a unique blend of theological depth and marketplace insight, Dr. Thong ensures that this course remains faithful to Scripture while relevant to the real–world challenges faced by Christian wealth managers today.

Certified Christian Wealth Manager™
Building Wealth with **Eternal Purpose**

Take Control of Your Success. Get Certified Today.

ISOFP
International Society of Financial Professionals

Overview

The International Society of Financial Professionals (ISOFP) was founded in the U.S. in 2010 and registered in Singapore in 2020 to expand into Asia. As a not-for-profit, it offers globally recognized certifications for financial professionals. ISOFP has over **16,000 members** globally.

Its accredited programs — such as the **Certified Wealth Management Advisor, Certified Credit Risk Analyst, Certified SME Lending Analyst** and **Certified Intellectual Property Advisor** — are delivered by industry experts to uphold excellence in wealth management and client advisory.

Where and when appropriate, ISOFP certifications are mapped to government and industry standards, including the Singapore Institute of Banking & Finance (IBF) competency frameworks.

ISOFP focuses on developing professional competencies through certified training programs that adhere to recognized standards of excellence.

ISOFP Objectives

- To ensure high professional integrity and relevancy for financial professionals globally
- To develop best practices and establish strategic partnerships worldwide
- To become a leading resource for professional development via certified trainings
- To create positive impacts and ethics within the industries, communities, organizations, and clients
- To foster a growth-minded community through dynamic member engagement — ranging from sharing sessions and educational forums to conferences and mastery programs— while actively collaborating with other professional organizations and associations for both virtual and in-person events

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In partnership with:

Generosity Path TrustBridge global