# Certified Christian Wealth Manager

## CCWM™ — Program Overview

Certified Christian Wealth Manager

| eLearning (23 Mar – 12 Apr) | Workshop 1 eCWMA™ (13 Apr) | Workshop 2 eCWMA™ (14 Apr) | Workshop 3 eCWMA™ (15 Apr) | JOG Session (optional) |
|---|---|---|---|---|

**CAPSTONE PROJECT — Personal Wealth Advisory Approach**
*Final Presentation & Portfolio Proposal — (EOD of Workshop 3)*

## 3-Week eLearning *(self-paced — estimated required time 1-1.5 hours/day)*

*Develop a common language, heart posture, provide backgrounds of thought leadership in integrating faith & wealth management.*

Online assignments for each week:

- **Read** the assigned readings
- **Watch** the videos
- **Analyze** — identify 1 chapter per reading document
- **Write** — post a 300-word reflection on which chapter/part resonates with you the most & why
- **Respond** to 2 other peers' posts

| Week 1 (23 – 29 Mar 2026) | Week 2 (30 Mar – 5 Apr 2026) | Week 3 (6 – 12 Apr 2025) |
|---|---|---|
| **Reordering the Heart: The Gospel & the Grip of Money** | **Integrating Eternal Impact & Rhythms of Practice** | **Spirit-Led Planning & Biblical Financial Wisdom** |
| Required readings:<br>◇ **The Heart Behind Wealth** — *Inward Focus*<br>◇ **Serving One Master: Treasure Christ, Not Money** — *Outward Focus* | Required readings:<br>◇ **Ethical Stewardship Practice with a Kingdom Mindset** — *Inward Focus*<br>◇ **Eternal ROI: Wealth in Light of Eternity** — *Outward Focus* | Required readings:<br>◇ **The Role of the Holy Spirit in Decision-Making** — *Inward Focus*<br>◇ **Biblical Principles of Financial Planning** — *Outward Focus* |

## 3-Day eCWMA™ Workshops *(in-person, 9 am – 6 pm)*

### Including CAPSTONE PROJECT — 2 parts:

- **A professional presentation** on "How I give wealth management advice & why I'm doing it this way" — *A Personal Wealth Advisory Approach based on biblical principles.*
- **A Portfolio Proposal Pitch Deck** — *For a client profile.*

| Workshop 1 Monday, 13 Apr 2026 | Workshop 2 Tuesday, 14 Apr 2026 | Workshop 3 Wednesday, 15 Apr 2026 |
|---|---|---|
| Private Banking & Wealth Management<br>**Industry Dynamics** | Private Banking & Wealth Management<br>**Conversations** | Private Banking & Wealth Management<br>**Investment Strategies** |
| Gain a deeper understanding on Private Banking and current trends' impact on clients, and how to position your PVP (Personal Value Proposition) effectively. | Build rapport with HNW clients and add value by understanding their needs through strategic frameworks and client engagement skills. | Offer tailored investment strategies and comprehensive wealth planning to HNW clients according to their unique needs and wealth season. |

## 1-Day JOG: Journey of Generosity

**Optional — for 1st timer only**
*(in-person, 9 am – 6 pm)*

**In partnership with:**

Generosity Path TrustBridge global

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**The Certified Christian Wealth Manager (CCWM™)** builds upon the **3 stand–alone workshops of eCWMA™ (Executive Certified Wealth Management Advisor)** — a program recognized under the IBF–FTS (Financial Training Scheme). Enriched with biblical principles, this blended learning journey offers a faith–integrated approach to wealth management and High-Net-Worth client advisory — equipping financial professionals for both excellence in practice and Kingdom impact.

## IBF–FTS Funding Criteria:

| | |
|---|---|
| **FTS Funding Quantum** | For training courses commencing from 1 January 2023:<br>◇ **Singapore Citizens & Singapore Permanent Residents** above 21 years old will be eligible for 30% co-funding of direct training costs *(capped at S$500 per trainee per course).*<br>◇ **Singapore Citizens aged 40 years old and above** will be eligible for 70% co-funding of direct training costs *(capped at S$500 per trainee per course).* |
| **Eligible Individuals** | ◇ Individuals must be **Company–Sponsored** *(require a **Letter-of-Support** from the company);*<br>◇ Singapore Citizens or Singapore Permanent Residents, **physically based in Singapore**; and<br>◇ Successfully **completed FTS recognized course** *(including passing all relevant assessments where applicable).* |
| **Eligible Companies to submit claims for eligible individuals** | ◇ Singapore-based Financial Institutions regulated by MAS (licensed or exempt from licensing by MAS).<br>◇ FinTech firms certified by Singapore FinTech Association (SFA). |

## Program Fees & Funding Details:

**Based on eCWMA™** Executive Certified Wealth Management Advisor

**3-Day Executive Workshops**
**(13, 14, 15 April 2026)**

***Includes:***

- *IBF–Accredited 21 CPD hours*
- *ISOFP Certification for eCWMA™*
- *ISOFP Certification for CCWM™*
- *ISOFP Membership (1-year)*

| IBF–FTS Funding | Total Fees (including GST) |
|---|---|
| **Program Fees** | **SGD 2,509** |
| **30% Funding**<br>Singapore Citizens and PR above 21 years old | **SGD 1,879** |
| **70% Funding**<br>Singapore Citizens aged 40 years old and above | **SGD 1,039** |

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.

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