



Certified Wealth Manager VS-1040

Vskills Certifications

Vskills Brochure



Skills for a secure future

Certified Wealth Manager

Certification Code VS-1040

Wealth Management has a wide scope of opportunities for individuals planning to make a career in finance. It requires thorough understanding of financial planning process, as well as, of financial products including equity, banking and fixed income, insurance, derivatives and structured products. A wealth manager must be conversant with these aspects to assist the client in aligning to their wealth management plans and provide additional value to them.

Why should one take this certification?

Vskills Certification in Wealth Management is for those candidates looking for opportunities in this sector catering to wide variety of services. The Certification focuses on the steps and process involved in wealth management, understanding client goals and constraints, role of insurance, retirement and estate planning and wealth management strategy. Vskills certification significantly improves the chances of getting the desired role and is an additional value to the candidate. This certification can be taken by candidates looking for new job opportunities or promotion or skill assessment.

Who will benefit from taking this certification?

Vskills Certification in Wealth Management is for candidates who are well-prepared and enthusiastic about entering this field and candidates who wish to improve their skill set and make their CV stronger. The Certification also assists the existing employees looking for a better role and proves their employers the value of their skills.

Test Details:

- **Duration:** 60 minutes
- **No. of questions:** 50
- **Maximum marks:** 50, Passing marks: 25 (50%); There is no negative marking in this module.

Fee Structure:

Rs. 3,999/- (Excludes taxes)*

* Fees may change without prior notice, please refer <http://www.vskills.in> for updated fees

Companies that hire Vskills Certified Wealth Manager

Vskills Certified Wealth Manager finds employment in big or small companies as a Wealth managers, financial planners and advisers, fund managers etc. There is a shortage of skilled professionals in this field and companies are in a constant look out of people well acquainted with the work culture and the processes involved.

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Sample Questions

1. The wealth management investment process is _____ client's wealth level.

- A. Independent of
- B. Dependent of
- C. inversely affected by
- D. directly affected by

2. _____ is most important to ensure that the client and the advisor have a same decision.

- A. Client Discussion
- B. Client Education
- C. Client meeting
- D. None of the above

3. When the investor's _____ exceeds his/her risk capacity, then _____ risk capacity should prevail.

- A. risk tolerance; higher
- B. fund investment; higher
- C. risk tolerance; lower
- D. fund investment; lower

4. A major function of wealth manager is to advice their clients on _____.

- A. controlling risk
- B. business development
- C. analyzing market movement
- D. investment allocation

5. Which amongst the following is a client constraint in wealth management?

- A. Time Horizon
- B. Liquidity requirement
- C. Priority
- D. All of the above

Answers: 1 (A), 2 (B), 3 (C), 4 (D), 5 (D)

Certifications

➤ Accounting, Banking and Finance

- Certified AML-KYC Compliance Officer
- Certified Business Accountant
- Certified Commercial Banker
- Certified Foreign Exchange Professional
- Certified GAAP Accounting Standards Professional
- Certified Financial Risk Management Professional
- Certified Merger and Acquisition Analyst
- Certified Tally 9.0 Professional
- Certified Treasury Market Professional
- Certified Wealth Manager

➤ Big Data

- Certified Hadoop and Mapreduce Professional

➤ Cloud Computing

- Certified Cloud Computing Professional

➤ Design

- Certified Interior Designer

➤ Digital Media

- Certified Social Media Marketing Professional
- Certified Inbound Marketing Professional
- Certified Digital Marketing Master

➤ Foreign Trade

- Certified Export Import (Foreign Trade) Professional

➤ Health, Nutrition and Well Being

- Certified Fitness Instructor

➤ Hospitality

- Certified Restaurant Team Member (Hospitality)

➤ Human Resources

- Certified HR Compensation Manager
- Certified HR Staffing Manager
- Certified Human Resources Manager
- Certified Performance Appraisal Manager

➤ Office Skills

- Certified Data Entry Operator
- Certified Office Administrator

➤ Project Management

- Certified Project Management Professional

➤ Real Estate

- Certified Real Estate Consultant

➤ Marketing

- Certified Marketing Manager

➤ Quality

- Certified Six Sigma Green Belt Professional
- Certified Six Sigma Black Belt Professional
- Certified TQM Professional

➤ Logistics & Supply Chain Management

- Certified International Logistics Professional
- Certified Logistics & SCM Professional
- Certified Purchase Manager
- Certified Supply Chain Management Professional

➤ Legal

- Certified IPR & Legal Manager
- Certified Labour Law Analyst
- Certified Business Law Analyst
- Certified Corporate Law Analyst

➤ Information Technology

- Certified ASP.NET Programmer
- Certified Basic Network Support Professional
- Certified Business Intelligence Professional
- Certified Core Java Developer
- Certified E-commerce Professional
- Certified IT Support Professional
- Certified PHP Professional
- Certified Selenium Professional
- Certified SEO Professional
- Certified Software Quality Assurance Professional

➤ Mobile Application Development

- Certified Android Apps Developer
- Certified iPhone Apps Developer

➤ Security

- Certified Ethical Hacking and Security Professional
- Certified Network Security Professional

➤ Management

- Certified Corporate Governance Professional
- Certified Corporate Social Responsibility Professional

➤ Life Skills

- Certified Business Communication Specialist
- Certified Public Relations Officer

➤ Media

- Certified Advertising Manager
- Certified Advertising Sales Professional

➤ Sales, BPO

- Certified Sales Manager
- Certified Telesales Executive

& many more job related certifications

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