



Family Offices Group



QUALIFIED FAMILY OFFICE PROFESSIONAL



Association of International
Wealth Management of India

About the Family Office Group (FOG)

The Family Offices Group is a 58,000+ member-strong association for single and multi-family office professionals. The Family Offices Group is an established professional organization created to connect single and multi-family office professionals for networking, resource referral, career advice, and eventually national/international strategic partnerships. The Family Offices Group has been working with family offices by providing valuable resources, training and networking opportunities. Our global team of thirty professionals are dedicated to expanding and improving our training and research efforts. Global Team: The group's global team of thirty professionals with over 25 years of experience in capital raising, marketing, client services and research are dedicated to expanding and improving our training and research efforts. Headquartered in Portland, Oregon, the Group has a global reach the team members often speak at conferences and events across the globe.

About the Association of International Wealth Management of India (AIWMI)

AIWMI is a premier education institution in advanced Wealth Management domain offering a wide variety of high-quality executive education programs. AIWMI programs combine state-of-the-art knowledge and skills in wealth management with practical experience and insights into the functioning of the financial sector. All AIWMI courses and education events have an intense and pragmatic curriculum. Participants are exposed to the latest developments within the wealth management sector. AIWMI primarily focuses on broader and strategic role of developing a more robust and forward-looking training infrastructure for private banking and wealth management sector and to promote more active industry involvement and collaboration in training and continuing education matters. AIWMI is the exclusive partner of Family Office Group for offering the prestigious Qualified Family Office Professional (QFOP) certification in South Asia & Gulf.

About Qualified Family Office Professional (QFOP) certification

The Qualified Family Office Professional (QFOP) certificate is the most comprehensive self-paced training program covering family office fundamentals, terms, best practices, trends, and areas of investment critical to single and multi-family offices. The QFOP training program includes training in many diverse areas related to investing capital for the ultra-affluent, including financial modeling & analysis, hedge funds, private equity, and investment banking.

Learn Directly From Global Single & Multi-Family Office Executives Including:

1. Interviews with over a dozen single family office executives, several of which manage over \$1B in wealth directly for one family
2. Recorded audio interviews with 20 global multi-family offices including top 30 family offices such as Threshold Group, Constellation Wealth Advisors, and Marcuard Family Office.
3. Insights from top family office thought leaders, experts, and risk consultants who manage family office portfolios daily



Who is this family office training program built for?

The Qualified Family Office Professional program is available for professionals in wealth management, investment fund management, trust & estates, insurance, capital raising, or other areas where more fundamental family office knowledge would be helpful. There are no minimum educational requirements for completing the QFOP program, it is available for anyone, and can be completed from anywhere in the world at a suitable pace using the internet.

How does the program work?

Once a candidate registers with AIWMI for the QFOP, he will receive a login and password for the online QFOP Classroom page. There, he will have access to the practice examination, training videos, and audio resources. Once he has gone through the materials there and the required text book and feel ready to take the QFOP examination, he can schedule himself for the online examination. The exam is held on the 10th of every month, giving you 12 opportunities to take the examination each year.

Who Offers the QFOP?

The Qualified Family Office Professional is offered through the Family Offices Group, a 58,000+ member networking association in the industry which is supported by the Global Training & Certification Institute, LLC. The G.T.C. Institute has trained and certified over 3,000 professionals around the world and the Qualified Family Office Professional (QFOP) program leverages that program management, test development, and online classroom environment building expertise for the family office industry.

QFOP Details and Timeline:

Program Details:

The Qualified Family Office Professional (QFOP) certification program is unique in that it is modelled after many online courses offered at Ivy League institutions today, while offering more value for a more cost-effective program. The QFOP program is a self-study program that includes educational multimedia resources in video form, a study guide, required readings, and a flexible online examination process, accessible around the world. The online exam is structured so that in order to complete the exam within the 3-hour time frame one must read through all of the assigned materials and conceptually understand the majority of the material to score well enough to pass the exam.

This certification program is designed to show and certify that a candidate has gained an in-depth understanding and high level specialized knowledge of family offices.

In addition to the benefits of gained knowledge, growing industry recognition, more knowledgeable career choices, and networking, both the Family Office Group & AIWMI are also developing additional resources for QFOP Participants. This includes video and MP3 recordings on

Q&A or strategies and tactics, webinars, access to interviews with family office professionals who have more than 10 years of experience in the industry, among many more benefits.

QFOP Learning Objectives:



To provide participants with a comprehensive understanding of the family office business model, line of services, operations, multi-generational wealth planning, and holistic approach to managing capital for the ultra-affluent.

QFOP Learning Modules:

The Family Offices Group and AIWMI have together developed an in-depth classroom area for participants in the QFOP program that includes over 300 originally produced training videos, and expert audio interviews on topics covering the following areas:

1. Single & Multi-Family Office Fundamentals
2. Family Office Operations, Trends, Portfolio Management, and Investing
3. Leadership & Management of Family Office Organizations
4. Private Equity, Venture Capital, Angel Investing, Real Estate, Hedge funds and Fund of Funds
5. Capital Preservation Methods & Strategies
6. Fundamentals of Trusts, Estates, and Global Taxation Issues
7. Family Office Business Development and Client Acquisition Strategies
8. Investment Banking & Financial Modeling
9. Fundamentals of Financial Analysis & Finance
10. Direct Investments



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