



**Sardar Vallabhbhai
Global University**



Batch Start Date	1 st December 2025 (Level 1 – Foundation Level)	
Eligibility	Candidates having cleared 10+2 examination from any stream	
CWM Study Modules	Level 1 – Foundation Level	Level 2 – Advanced Wealth Management
	<p>Module 1: Introduction to Wealth Management <u>Unit 1:</u> Understanding Wealth Management & Financial Planning <u>Unit 2:</u> Indian & Global Financial System</p> <p>Module 2: Investment Management & Planning <u>Unit 3:</u> Investment Vehicles of Wealth Management <u>Unit 4:</u> Measuring Investment Risk & Returns</p> <p>Module 3: Products in Wealth Management <u>Unit 5:</u> Insurance & Risk Management <u>Unit 6:</u> Role of Wealth Management in Banking</p> <p>Module 4: Legal & Taxation Aspects in Wealth Management <u>Unit 7:</u> Legal Framework in Wealth Management <u>Unit 8:</u> Taxation & Wealth Management</p> <p>Module 5: Applied Wealth Management Strategies <u>Unit 9:</u> Life Cycle Management <u>Unit 10:</u> Intergenerational Wealth Transfer & Tax Planning</p>	<p>Module 6: Asset Classes in Wealth Management <u>Unit 1:</u> Equity Research & Analysis <u>Unit 2:</u> Alternative Investment Products <u>Unit 3:</u> Real Estate Valuation & Investment</p> <p>Module 7: Behavioural Finance & Relationship Management <u>Unit 4:</u> Behavioural Finance in Wealth Management <u>Unit 5:</u> Client Relationship Management</p> <p>Module 8: Financial Planning & Portfolio Management <u>Unit 6:</u> Loan & Debt Management <u>Unit 7:</u> Portfolio Management Strategies <u>Unit 8:</u> International Taxation & Trust Planning</p> <p>Module 9: Wealth Management in Practice <u>Unit 9:</u> Financial Planning for Business Owners & Professionals <u>Unit 10:</u> Advanced Wealth Management</p>

CWM Examination	MCQ's (Objective)	MCQ's (Objective)
	3 hours	3 hours
	85 questions (160 marks)	85 questions (160 marks)
	50% passing marks (No negative marking)	50% passing marks (No negative marking)
	<ul style="list-style-type: none"> • Online exam with monthly frequency • At Pearson VUE and NSE centres 	<ul style="list-style-type: none"> • Online exam with monthly frequency • At Pearson VUE and NSE centres
Unique Benefits	<ul style="list-style-type: none"> • Expert faculty with 20 years' experience of preparing students for certifications like CFA, CFP, CWM • Detailed study material • Rigorous practice of MCQ's • Special waiver on CWM registration and exam fees • Placement assistance after clearing Level 2 	
Weekly Class Schedule	<ul style="list-style-type: none"> • 5 sessions of 90 minutes each • Afternoon hours after college 	
Tuition Fees (Payable to SVGU)	Level 1 – 12,500 Level 2 – 12,500 To be paid at the beginning of tutoring for each level	
Certification	Joint certificate by SVGU & AAFM India after both levels	

REGISTRATION FOR CWM GLOBAL CHARTER (AWARDED BY AAFM)

AAFM India Registration Fees (Payable to AAFM India)	Registration: Rs. 25,200 + GST <i>(After 40% waiver, for SVGU students)</i> Level 1 exam fees: Rs. 3,000 + GST Level 2 exam fees: Rs. 4,000 + GST <i>(After 50% waiver for the first attempt, for SVGU students)</i>
Certification	CWM charter awarded after graduation
Calculator	CASIO FC-200V Financial Consultant (Approx. cost: Rs. 3,000)
<p style="text-align: center;">Sardar Vallabhbhai Global University Next to Shapath IV, S.G. Highway, Prahlad Nagar Area Ahmedabad 380015</p> <p style="text-align: center;">Contact Nos.: 9265 576924, 92277 57774 bba-cwm@svgu.ac.in www.svgu.in</p>	