

# CERTIFIED PRIVATE WEALTH ADVISOR® (CPWA®) CERTIFICATION PROGRAM

Serving high-net-worth advisors and their clients



The Certified Private Wealth Advisor® (CPWA®) certification is designed for advisors who seek the latest, most advanced knowledge and techniques to address the sophisticated needs of high-net-worth clients. By participating, advisors learn to identify and analyze challenges high-net-worth families and individuals face and understand how to develop specific strategies to minimize taxes, monetize and protect assets, maximize growth, and transfer wealth. The program takes a holistic, multidisciplinary approach and focuses on the full cycle of wealth: accumulation, preservation, and distribution.

**Typical Time Commitment:** 6 months

**Minimum Work Experience Requirement:**  
5 years (financial)

**Accreditation:** ANAB

**Adherence to Code of Ethics/Standards:** Yes

## CPWA Comprehensive Exam Overview

| Exam Percentage | Topics  |
|-----------------|---|
| 13%             | <b>Human Dynamics</b><br>Ethics, Behavioral Finance, Family Dynamics  |
| 34%             | <b>Wealth Management Technical Design</b><br>Tax Planning, Portfolio Management, Risk Management, Asset Protection            |
| 23%             | <b>Legacy Issues</b><br>Charitable Giving and Endowments, Estate Issues, Wealth Transfer                                      |
| 30%             | <b>Specialty Client Services</b><br>Planning for Executives, Planning for Closely Held Business Owners, Retirement Management |

## Why earn the CPWA certification?

Today's affluent investors demand more from their financial advisor. These clients have more complex financial needs and are looking for broad knowledge to help them continue to grow their wealth and preserve it. In order to stay relevant and serve these complex needs, advisors need to broaden their base of knowledge for themselves and for their team.

## Specialized expertise and skills

The explosion in global wealth in recent years has resulted in more high-net-worth clients than ever. In addition, the needs of these clients are increasingly complex. CPWA certification gives advisors the specific expertise and skills needed to confidently advise these clients and provide the high level of customer service they expect and demand.

## Differentiation through credibility

In the highly competitive field of wealth management, clients are very selective in choosing advisors. CPWA certification gives advisors the edge they need to stand out. In addition to gaining rigorous wealth management knowledge, being a CPWA certification holder means you are adhering to the highest ethical standards to best serve your clients.

## Higher compensation

Educated advisors manage more assets, generate more revenue, and attract a larger share of investable assets. Learning more means earning more. Through the CPWA certification advisors become more knowledgeable, confident, and competent to serve their clients.



### Who should earn the CPWA certification?

Wealth management advisors, financial planners, private banking and trust, investment consultants, family office advisors, tax advisors, estate planning specialists



### Expert Instruction

The CPWA curriculum is taught by preeminent academic and practitioner faculty. All instructors are subject matter experts in their respective fields. This provides a mix of Ivy League-quality education and practical application.

## PRICING

Open Enrollment Rate for  
Yale and Booth: \$7,295

Private classes and group registration packages  
available on request.

Learn more about the CPWA certification at  
[investmentsandwealth.org/certifications/welcome-to-cpwa](https://investmentsandwealth.org/certifications/welcome-to-cpwa)

