

Chartered Family Office Specialist™ Program (CFOS™)



Association of Private Bankers in Greater China Region

Prospect of Family Office Development

New Concept

Global Trend

High Potential in Greater China Region

Family Office in the World

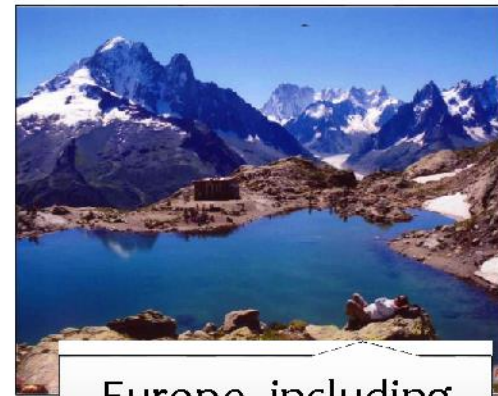
The following countries have already well developed family office business models:



Singapore

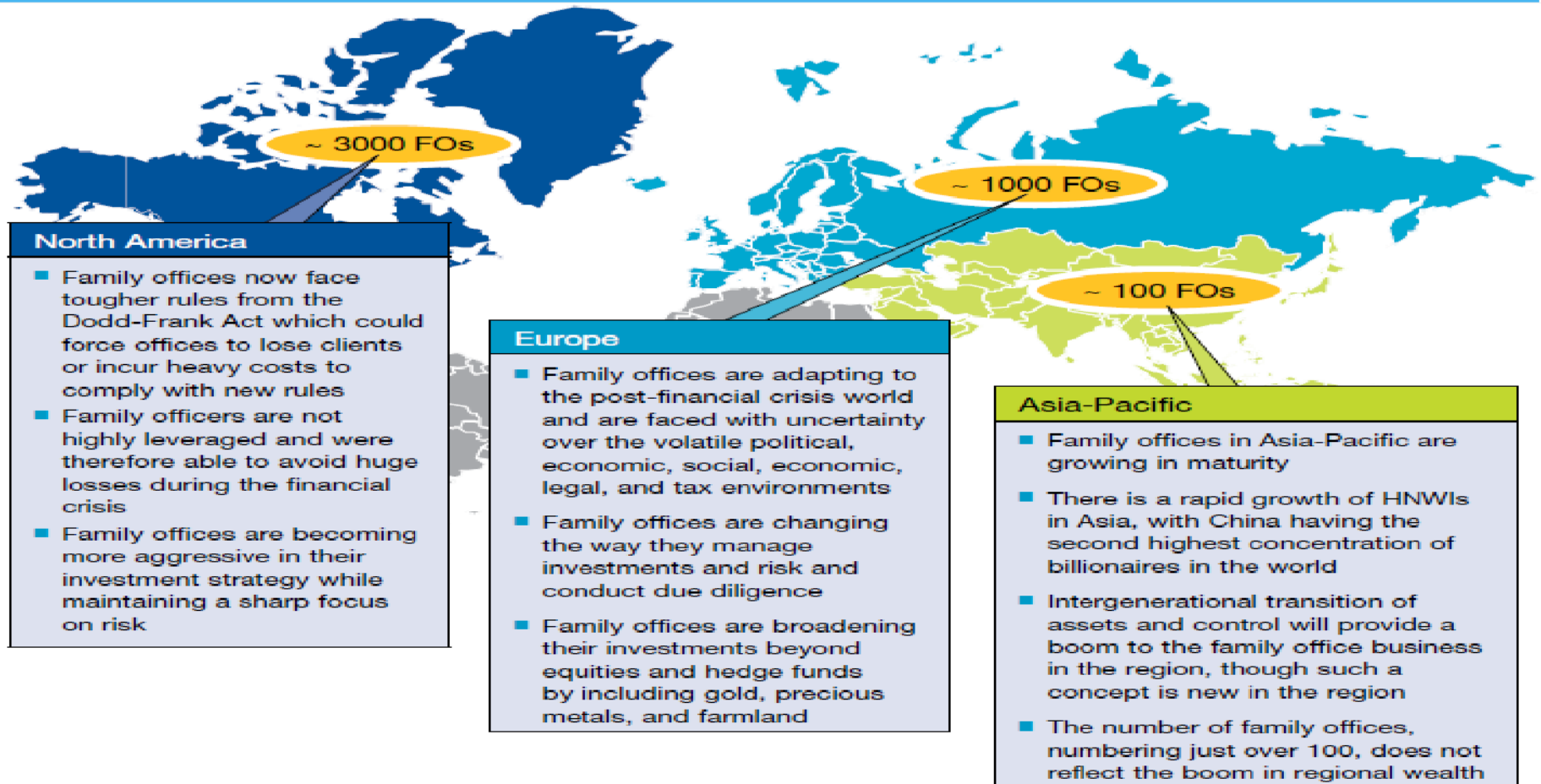


U.S.A.



Europe, including
Switzerland

Family Office in Greater China



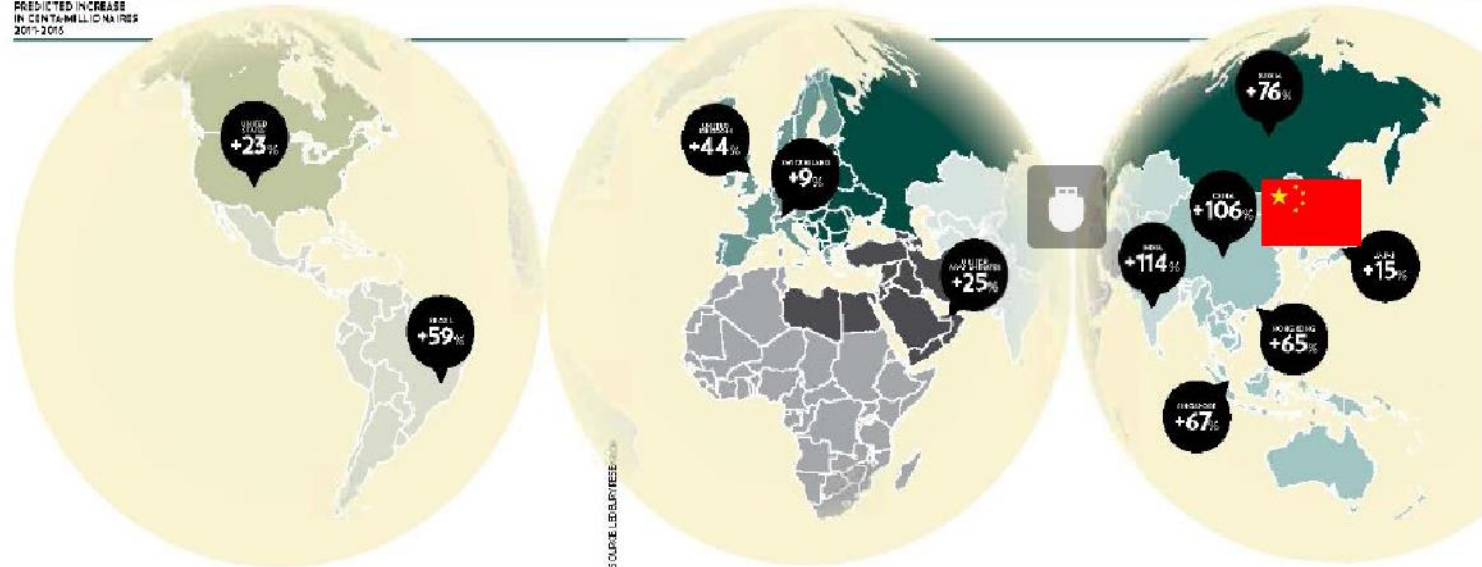
Annual growth rate of Billionaires in China: 4% – 8 %

Growth of Wealth in Asia

RISE OF THE NEW RICH

THE DISTRIBUTION OF THE WORLD'S SUPER-RICH IS SHIFTING. GRÁINNE GILMORE SEEKS OUT FUTURE GLOBAL WEALTH HOTSPOTS AND DISCOVERS IT'S NOT ALL ABOUT CHINA

PREDICTED INCREASE IN CENTA-MILLIONAIRES 2010-2016



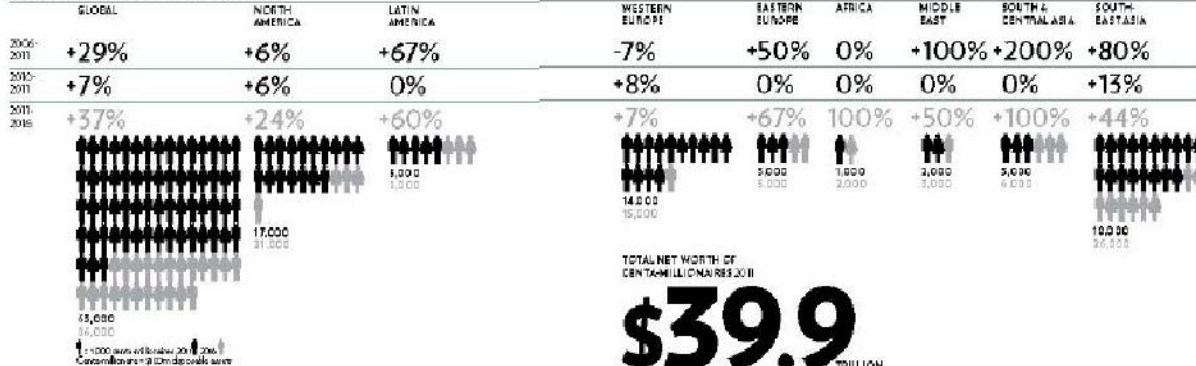
ECONOMIC CENTRE OF GRAVITY



London School of Economics professor Terry Quinn has estimated that the economic centre of gravity of the world's average income of nations (measured by GDP) has shifted from Europe in 1990 to Asia in 2016. Quinn's research is based on the fact that the Asian Century is now under way. China and India's 2010-2016 projected rate of growth will follow similar trajectories.

SOURCE: GLOBAL ECONOMIC CENTRE OF GRAVITY (LSE) (2012)

INCREASE IN CENTA-MILLIONAIRES BY GLOBAL REGION



TOTAL NET WORTH OF CENTA-MILLIONAIRES 2011

\$39.9 TRILLION

HOW TO POINT OF VIEW: WHAT'S HEAT TO YOUR WEALTH?

- 1. The only global financial hub: SINGAPOREAN
- 2. Regional wealth: MIDDLE EASTERN
- 3. National riches: SOUTH ASIAN
- 4. Global riches: INDIAN
- 5. A global riches of the power elite: RUSSIAN
- 6. The global riches of money: CHINESE

For more survey results and insight into global wealth trends, visit www.pwc.com/wealth

Motivations in hiring Family Office Specialists



Risk Mitigation in
Deal Execution &
Asset Management



Tax Mitigation in
Investment,
Divestiture & Wealth
Transfer

Motivations in hiring Family Office Specialists

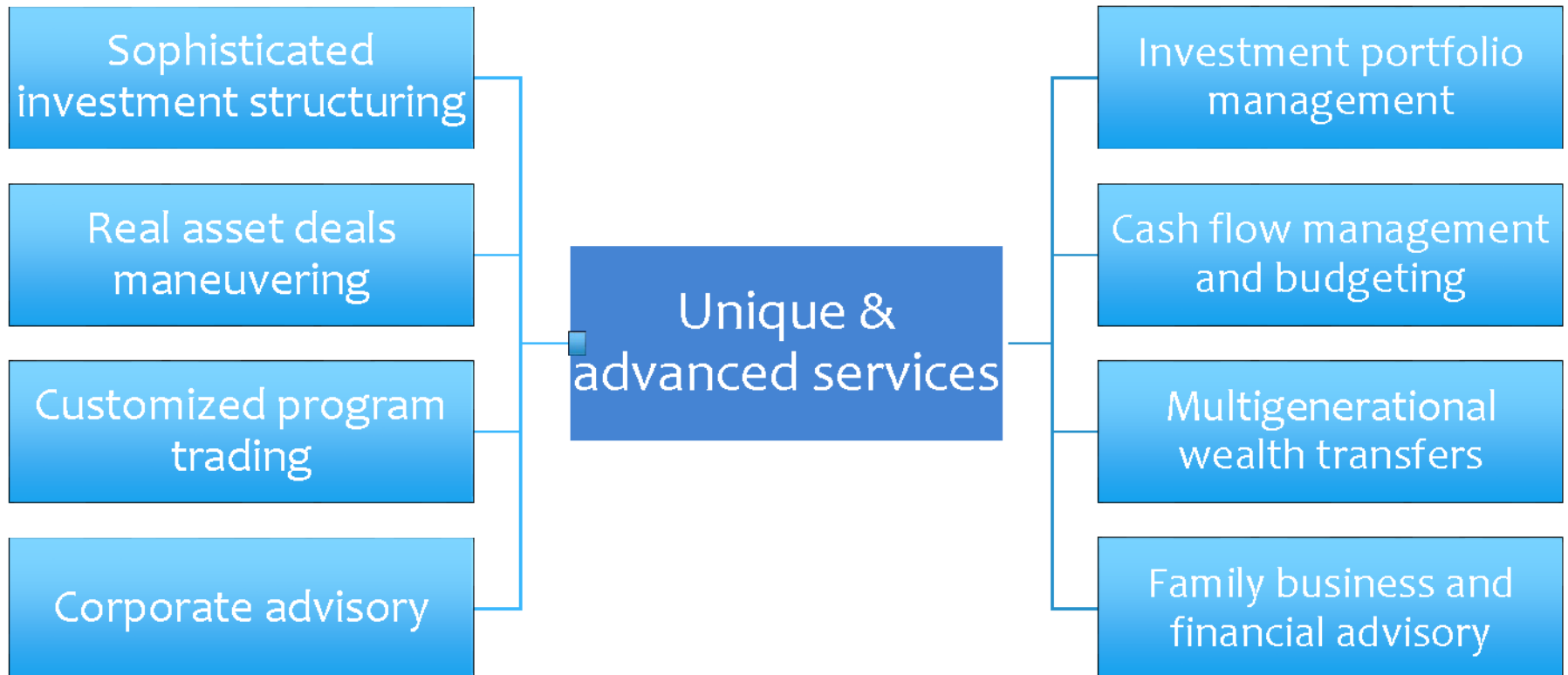


Asset Preservation
& Continuous
Growth in Asset



Best Interest In
Long Run

Motivations in hiring Family Office Specialists to Mega Wealth Holders



Prospect of Family Office Specialist

- Annual Salary of Family Office Specialist: over USD\$130,000
- Bonus is based on performance and business, equivalent to 4-12 monthly salary normally
- Prestigious local bank and foreign corporation start or expand their Family Office business
- For example, UBS, Credit Suisse, Merrill Lynch expand their Family Office business in 2013 and set up their Asia hub
- Family Office Specialist can work in Family Office, Private Banking, Trust, PE, Asset Management, Investment Banking, Consultancy

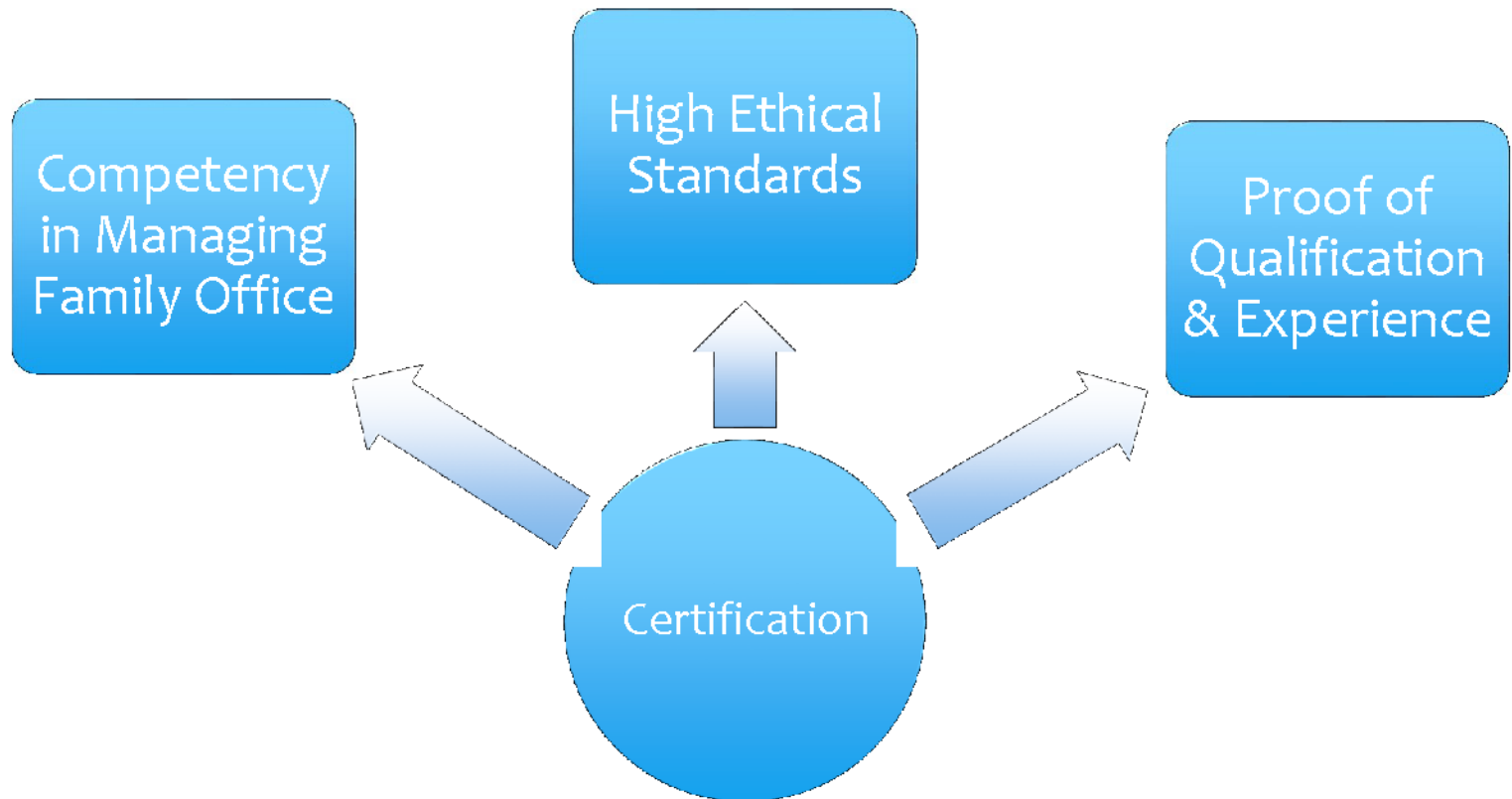
Why You Should Take This Course?

Access to The
Prestigious Circle

Fast Track
Program

The Only Program
to Certify Family
Office Specialists

What Is This Certificate About?



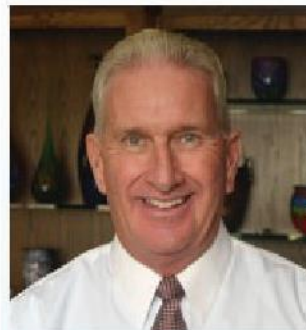
Learner's Sharing



Renee' Caputi

Sr. Wealth Planning Strategist

CFOS™ is a way to improve knowledge and skills in our competitive industry. Current knowledge and skill to apply is a key differentiator in our field. It helps to provide a baseline of necessary knowledge for a career in the industry. It is an additional training in my field to help me better serve clients.



Mr. John L. Blattner

Partner at the Public Finance Institute

CFOS™ is not just applicable to the practitioners of family office. It is also of great advantage to all other financial practitioners by learning more about the skills and knowledge in financial negotiation. Mr. John L. Blattner said CFOS™ program is highly recommended!

Appropriate students for CFOS

Mega Wealth
Owners

Family Office
Practitioners

Trust Officers

Investment &
Corporate
Advisors

Estate
Planners

Financial
Professionals

Wealth
Managers

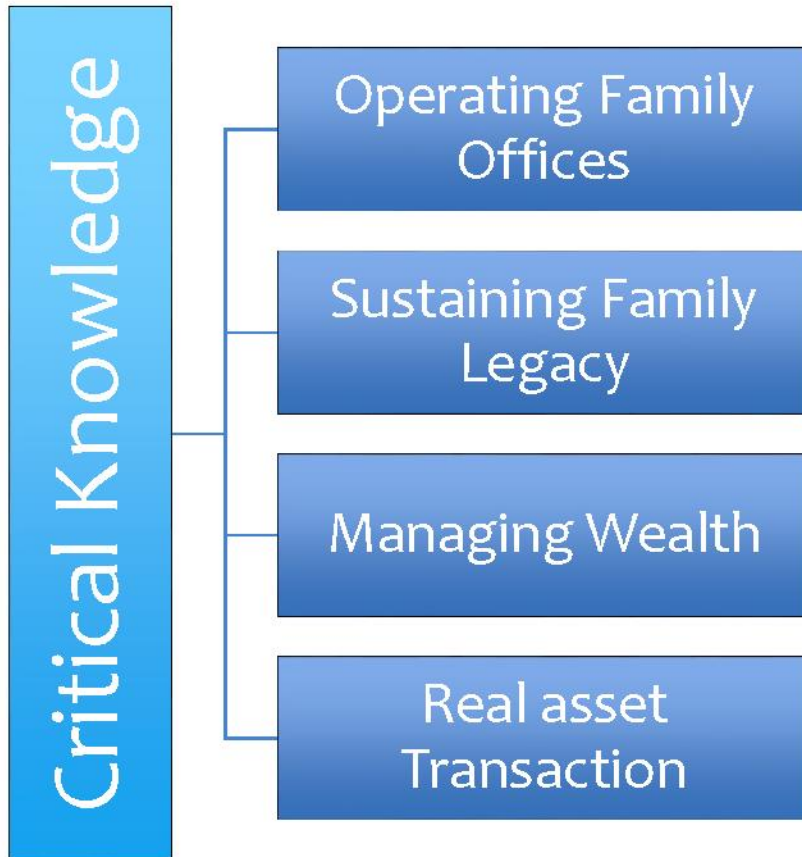
Students and
Aspiring
Professionals

Investment
Bankers

CFOS Curriculum

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4 Core Knowledge



Practical Application



Address the complicated project requirement to formulate the due diligence plan



Work with professionals with diverse expertise for managing family office operation

Practical Application



Manage investments, private equity & real asset transactions for mega wealth holders



Structure deals, manage risks and assist wealthy families in attaining specific goals

The Parties to Accredit and Certify CFOS™ in and issue Charter Certificates



Level 2 & 3
Developer
Course Promoter in
Asia



Quality Underwriter



Level 1 Course
Developer

Curriculum (Financial Assets)

Investment
Theories,
Planning, and
Strategies

Asset Allocation &
Portfolio
Management

Asset Valuation

Derivatives and
Financial
Instruments

Insurance
Planning and Risk
Management

Market Overview
and Economics

Curriculum (Real Assets)

Accounting
Fundamentals

Financial
Statement
Analysis

Due Diligence,
Risk Management,
and Performance
Measurement

Real Asset &
Alternative
Investments e.g.
Distressed Asset

Real Estate
Investments

Corporate & Asset
Valuation

Curriculum(Family Office Management)

Estate and Trust
Principles

Anti-Money
Laundering

The Soft Side of
Family Office
Management

Family Governance &
Family Office Best
Practices

Industry Review,
Industry Dynamics
and Trends

Case Studies

3 Levels CFOS and Pricing

Mode of Study

Level 1 - Online Mode

Standard Price USD 3995

Online
Access &
Training
Material
from FAU &
APB

Live Lecture
and Online
Tutorial by
FAU
Professors

Online Exam



Mode of Study

Level 2 - Workshop

Standard Price USD 3995

4 days
practical
business
workshop

One Group
Assignment :
A Business
Plan of a
Family Office /
Advisory Firm

Sharing from
industry
veterans in
the region
Case study
discussion



Mode of Study

Level 1 & 2 Blended Mode

Online
Access &
Training
Material
from FAU &
APB

4-day
Practical
Workshop
Directed by
Local
Industry
Veterans

One Group
Assignment
: A Business
Plan of a
Family
Office /
Advisory
Firm

Online Exam

Standard Price USD 7990
Promotion Price USD 6500



Mode of Study

Level 3

MFO Founder Boot-camp

<p>Online Access & Training Material from FAU & APB</p>	<p>3-day Boot-camp Plus 3 days Exchange Trip to US / Singapore and HK</p>	<p>One Individual Assignment : Solution to Given Business Cases</p>	<p>Offline Exam Attach and Interview by Industry Veterans</p>
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Standard Price USD 10,000
Optional Exchange Trip :
Actual Cost and schedule to be quoted one month prior to the trip



CFOS Pricing

CFOS Pricing

Standard Price USD

- | | |
|---|-----------------------|
| * Level 1 CFOS Standard (Online) | 3995 |
| * Level 2 CFOS Advanced Program (Workshop) | 3995 |
| * Level 1 & 2 CFOS 2 Certificates (Blended) | 7990 (6500 Promotion) |
| * Level 3 CFOS MFO Founder (Boot-camp) | 10000 (plus trip) |
| * CFOS Customized | Promoter Determine |
| * Access Fee to FAU Blackboard System | 500 |
| * Certificate Delivery Charge | Actual Cost |
| * Exam Retake | 500 |

Course Enrollment

- * Website: www.private-bankers.net
- * Phone: +852 3499 3851
- * PRC Phone : +86 147 1433 4066
- * Email : enroll@private-bankers.net
- * Enquiry : support@private-bankers.net
- * Partnership : admin@private-bankers.net



CFOS™ LEADS YOU TO THE ROAD OF PROFESSIONALISM!