Postgraduate Diploma in Private Wealth Advice (Cohort 3)

Course Goes Live 4 November 2024
Welcome & Getting Started 7 November 2024 @ 13:00-14:30 (UK time)

6-7 December 2024	
Masterclass 1: Family Business Advising By Ken McCracken	Friday 13:00 - 17:00 (UK time)
Masterclass 2: Strategic Risk Management for Leaders By Jonathan Bowdler	Saturday 09:00 - 13:00 (UK time)

10-11 January 2025	
Masterclass 3: Digital Assets By Leigh Sagar	Friday 13:00 - 17:00 (UK time)
Masterclass 4: Trust Disputes By Leigh Sagar	Saturday 09:00 - 13:00 (UK time)

Reflective journal draft submission – 3 February 2025

14-15 February 2025	
Masterclass 5: Cross-Border Succession By Michael Wells-Greco	Friday 13:00 - 17:00 (UK time)
Masterclass 6: Strategic Philanthropy By Maya Prabhu	Saturday 09:00 - 13:00 (UK time)

14-15 March 2025	
Masterclass 7: International Taxation & Information Exchange **Speaker TBC**	Friday 13:00 - 17:00 (UK time)
Masterclass 8: Compliance for Trustees **By Robin McGhee**	Saturday 09:00 - 13:00 (UK time)

Leadership and Strategy Session

25 – 26 April 2025	
Leadership and Judgement **By Freek Vermeulen**	Friday 13:00 - 15:30 (UK time)
Sales and Marketing **By Katie King**	Saturday 09:00 - 11:30 (UK time)

Assessment Preparation 11 March 2025 (9:30-11:00 UK time)

Assessment

Reflective journal – 7 April 2025
1,000 – 1,500 words commentary per masterclass to include notes on the case study outcomes

Oral Assessment – Taking place weeks commencing 5 – 16 May 2025

Results to be released on 19 June 2025