THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

WMCP®

WEALTH MANAGEMENT CERTIFIED PROFESSIONAL®

Redefining the value of wealth management

WHY BECOME A

WEALTH MANAGEMENT CERTIFIED PROFESSIONAL®

Today, wealth management is not about active security selection but rather a relationship aligned with client goals and executed through holistic and comprehensive planning. Our Wealth Management Certified Professional® (WMCP®) Program delivers the strategic and practical framework you need to build broadly-diversified, tax-efficient portfolios tethered to a range of client needs.

Becoming a WMCP® gives you:

- Expertise in goal identification, risk management, and investment management
- Understanding of behavioral finance and how to coach clients to improve long-term outcomes
- Knowledge of portfolio construction, tax theory, and tax-efficient strategies
- Skills to evaluate financial instruments and their uses
- Confidence to deepen client relationships by delivering value with an advisory, not investment selection, mindset

YOUR DIFFERENTIATOR:

GOAL-BASED WEALTH MANAGEMENT WITH THE AMERICAN COLLEGE OF FINANCIAL SERVICES

The WMCP® Program provides professionals with an education rooted in modern-day goal-based portfolio strategies, allowing you to customize your wealth management solutions to satisfy clients' diverse needs and build long-lasting, trusted relationships.

The program features:

Core curriculum on constructing broadly diversified, tax-efficient portfolios

Enhanced focus on behavioral finance and ethics, areas of growing importance

Elite faculty of nationally recognized academics, researchers, and practitioners

Modern e-learning with dynamic presentations and graphics, practice exams, and knowledge checks to both engage and help you retain the material

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Constructed by 25+ top wealth management experts

"The terrific WMCP® program should be mandatory material for all advisors. I simply cannot imagine a better program to help me move forward in my advisor practice and elevate my knowledge."

– Robert Edry, MBA, WMCP®, CLTC®, CFP®

WMCP® WEALTH MANAGEMENT CERTIFIED PROFESSIONAL®

PROGRAM AT A GLANCE

The College's WMCP® Program is ideal for established financial professionals looking to expand their knowledge in wealth management and behavioral strategies, advisors transitioning business models, or new advisors looking for an introduction to wealth management principles.

YOUR LEARNING OUTCOMES:

- Employ a goal-based process for planning and managing client wealth
- Create an efficient investment portfolio
- Evaluate financial instruments
- Formulate a wealth management strategy
- Provide solutions for complex client needs

TUITION: $2,950 or less

TIMING: Complete in 12 months or less

FORMAT: 100% online, self-study

TUITION SAVINGS AND SCHOLARSHIP OPPORTUNITIES

Program tuition can be paid on a per-course basis, or packaged together at a reduced rate. Tuition covers your course fees, final exam, and course materials.

Scholarship opportunities for active-duty, guard and reserve service members, veterans, and spouses, African American financial professionals, women, and other qualifying groups are available. Learn more at **TheAmericanCollege.edu/Scholarships**.

"Just building portfolios is the past. WMCP® has set me up to expand my expertise and my services now and in the future.It's about your clients, their family, their business, and their legacy."

– Lee Williams, WMCP®

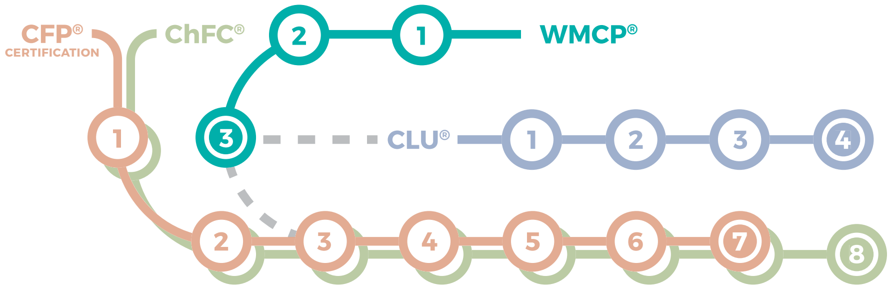
YOUR EDUCATIONAL JOURNEY STARTS HERE

There are no prerequisite courses required before you can begin the program; however, to receive and maintain the WMCP® designation, you must:

- Successfully complete the three required courses in our WMCP® Program
- Hold one or more years of relevant business experience (accumulated up to five years before completion of program)
- Agree to comply with The College's Code of Ethics and Procedures
- Participate in the annual Professional Recertification Program (PRP)

YOUR ROADMAP TO SUCCESS

Your learning journey doesn't have to begin or end with earning your WMCP® designation. Our three-course WMCP® Program can fit into any lifelong learning journey with The American College of Financial Services.



By completing our WMCP® Program, you are easily able to transition your educational experience into our CFP® Certification Education Program or our Chartered Financial Consultant® (ChFC®) Program. You also only need four (4) more courses to earn your Chartered Life Underwriter® (CLU®) designation, the gold standard in life insurance planning.

YOUR BEST INVESTMENT

The American College of Financial Services delivers applied financial knowledge and education, promotes lifelong learning, and advocates for ethical standards for the benefit of society.

As a lifelong learning partner, you will benefit from:

- **Extensive professional network** of one-in-five financial advisors educated by The College
- **Ready-to-use knowledge** delivered by plugged-in, industry-leading experts
- **Interactive community engagement** featuring frequent webinars, conferences, and professional development events
- **Advanced planning skills** and real-world application not delivered elsewhere
- **Modern education** through the latest in mobile-friendly, e-learning technology
- **Prestigious pedigree and client recognition** from nearly 100 years of academic excellence

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WMCP®

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To learn more, visit TheAmericanCollege.edu/WMCP
or call 866-724-2720

The mark of WMCP® is the property of The American College of Financial Services and may be used by individuals who have successfully completed the initial and ongoing certification requirements for this designation. The College can disallow use of the WMCP® if advisors do not adhere to the program's ethical standards, continuing education, and other requirements.

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