



THE
AMERICAN
COLLEGE
OF FINANCIAL SERVICES®

WMCP®

Wealth Management Certified Professional®

Expertise in goal-based wealth management

TheAmericanCollege.edu/WMCP



Why Become a WMCP®?

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

“*The WMCP® Program deepened my understanding of advanced wealth management strategies in a way that’s both academically rigorous and directly applicable to client work.*”

Gregory Kelly, WMCP®

68%

of designees report notable improvement in client service compared to advisors with no designations.¹

¹ FUSE Research Network. The American College of Financial Services Designation Outcomes Study. 2024. Based on reported three-year growth.



Your Differentiator: Goal-Based Wealth Management

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.

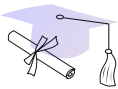
The program features:



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

WMCP®
designees report

+144%

higher growth in client
retention than advisors
with no designations.¹

¹ FUSE Research Network. The American College of Financial Services Designation Outcomes Study. 2024. Based on reported three-year growth.

WMCP[®] 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.

Tuition	Timing
\$2,995	Complete in 12 months or less
Format	
100% online, self-study	
Your Learning Outcomes	
<ul style="list-style-type: none">• 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 Savings and Scholarship Opportunities	
<p>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.</p> <p>Scholarship opportunities for qualifying groups are available.</p>	

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.

Expertise For Every Stage

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

WMCP[®]

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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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