

CWA- CERTIFIED WEALTHCARE ANALYST™

APPLICATION FOR ENROLLMENT

The Certified Wealthcare Analyst designation is taught by a team of six instructors through a combination of live web-casts (or attendance of one of our periodic training conferences held around the county), extensive reference materials and real-life “hands on” case studies. The coursework involves six separate lessons, seven exams (exams require a passing grade of at least 75%) and five real-life case studies.

The entire program can be completed in as little as six weeks with intensive personal study and significant personal attention from your sponsoring Certified Wealthcare Analyst instructor (each enrollee is automatically assigned a primary instructor) but often can take over a year to complete.

Coursework:

- Lesson 1- Presenting the Value Proposition – Do you perceive a contradiction?
Lesson 2- Profiling the Wealthcare Way & CASE STUDY #1 – Profile a Client/Prospect
- Lesson 3- Building Capital Market Assumptions
- Lesson 4- Designing & Presenting Recommendations & Complete CASE STUDY #1
- Lesson 5- Ongoing Service & Advice
- Lesson 6- Implementation- Portfolios consistent with Wealthcare premises
- FINAL EXAM
- Four additional case studies where the best learning happens by delivering Wealthcare to real clients/prospects.

Wealthcare Capital Management offers this intensive training and certification program without cost to qualifying financial advisors. To qualify, you must hold one of the following (check all that are applicable):

NASD/NYSE Series 7_____ Series 65_____ State RIA_____ SEC RIA_____

I hereby request you accept my application to enroll and earn my CWA-Certified Wealthcare Analyst™ designation by completing all of the program requirements within two years of my enrollment date.

(Advisor Name – PLEASE PRINT)

(Email Address)

(Signature)

(Date)

(Phone)

Accepted by: _____ on _____
(Signature of Authorized Certified Wealthcare Analyst™) (Date)

Fax this form to 804-644-4759

NOT VALID UNLESS ACCEPTED BY AUTHORIZED WEALTHCARE ANALYST