Finance Training Society

305-503-9050

CRN# 40745

QFOP

QUALIFIED FAMILY OFFICE PROFESSIONAL

Syllabus: Qualified Family Office Professional (QFOP) – CRN# 40745

Program Coordinators: Richard C. Wilson
Location: 100% Online-Based

Time: Self-Paced Program
Email: Team@FinanceTraining.com

Program Aim: As a misunderstood and often ill-defined industry our aim is to educate the participants on all areas of the family office industry.

Learning Objectives of the QFOP:

1. To provide participants with a comprehensive understanding of the family office business model, line of services, operations, multi-generational wealth planning, and holistic approach to managing capital for the ultra-affluent.
2. To ensure that graduates leave the program with a basic understanding of relevant areas of family office wealth management including: investment banking, hedge fund investment strategies, private equity, venture capital, financial analysis, and financial modeling.
3. To provide participants with a sense of confidence in how other family offices around the globe are investing their capital, managing portfolios, and conducting due diligence on investment opportunities and fund managers.

Program Requirements:

1. *Completion of the online QFOP examination as described in the QFOP Study Guide*.

    a.) **Examination**: The examination is 320 multiple choice questions long within a timed and secure online testing environment.

2. *Self-Management*: The Qualified Family Office Professional (QFOP) designation is a self-study certification program. Though we want to see you succeed, your success depends on and directly corresponds to the amount of effort and time you put into learning the material. We have implemented the necessary tools to assist you in studying, such as a

study guide with defined and in-depth topics and terms to know, as well as a 50 question practice exam to help you gauge your grasp of the information in the texts. We have also created videos on family office business development, investing, due diligence, manager selection, operations, fundamentals as well as the various investment areas that family offices often invest in such as private equity, hedge funds and real estate in order to supplement the reading material.

3. *Time-Management*: As the QFOP is a self-study program, it is your responsibility to make time to read the required texts and to ask questions as they arise.

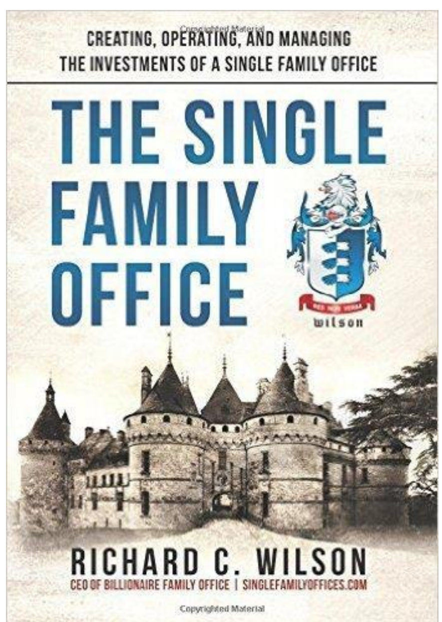
4. *Exam time*: Examinations are offered on the 1st Wednesday of the new month. Please email us once you are ready to schedule your examination. You will have three hours to complete your examination on your scheduled date.

Required Text: The following book is available online and in most bookstores. Amazon.com carries the required text below:

The Single Family Office by: Richard C. Wilson

ISBN:9781503345034

**PDF Available for free upon Registration.



Required Tools: Internet access and an Internet browser are required to take the online exam. (Internet Explorer and Firefox work best, though most browsers should suffice.)

Exam: (180 points)

CRN# 40745

- 180 multiple choice/true-false questions

MASTER'S CERTIFICATE PROGRAMS: Family Office Club & Finance Training Society is proud to offer several advanced Master's Certificates that require the completion of five programs from the Finance Training & Certification Institute platform.

To learn more about these Master's Certificates and how to earn one, please see our website: FinanceTraining.com/Masters-Certificate-Online/

Questions:

If you have any questions or concerns, please feel free to contact us through Team@FinanceTraining.com or call us (305)503-9050 Monday- Friday 9:00 am- 5:00pm EST.

Finance Training Society

Team@FinanceTraining.com

328 Crandon Blvd Suite 223

Key Biscayne, FL 33149 USA

Monday- Friday

9:00am -5:00pm EST

305-503-9050