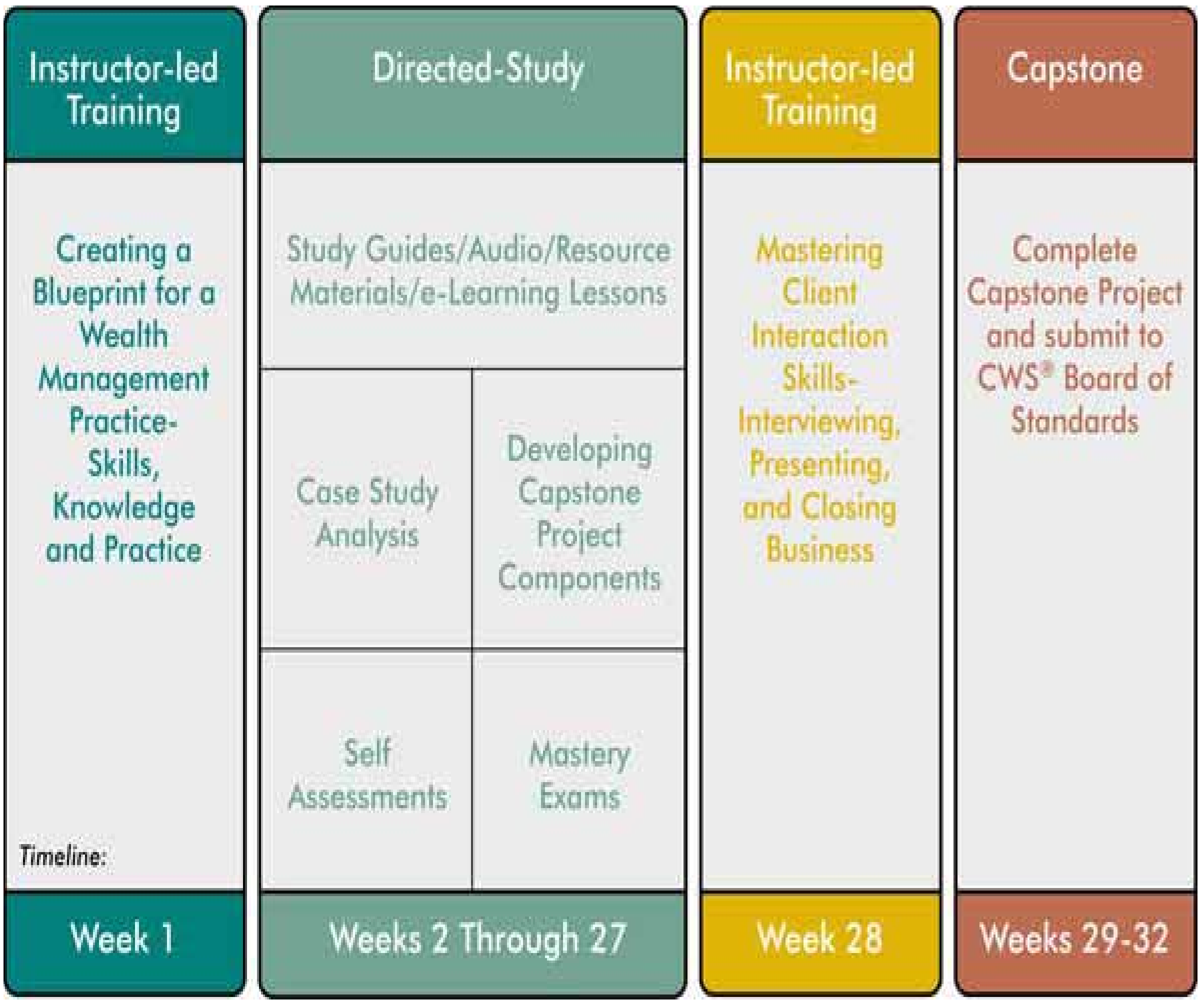
The CWS® Program Components
The blended learning approach integrates technical knowledge and client application and is a distinguishing feature of the CWS® program. The program blends the delivery of the content through multiple formats, and it blends knowledge and skills to provide a unique merger between academic study and real world application. Participants will engage in the following learning experience and activities:



Participate in 2-day Instructor-led Session

Sales and Practice Management Skills *(CWS® I)*
- **Blueprint for Growing Your Business**
- **Growing Organically**
- **Attracting New Clients**
- **Client Retention Branding Yourself and Your Business**

Complete Directed Study

For each of the Ten Lessons:

Complete Study Guide Assignments

- o Lesson Objectives

- Lesson Plan
- Core Reading Assignment
- Decision Tree(s)
- Case Studies
- Self-Assessment

Complete Assigned Readings

- Cannon Concepts assigned readings
- 21st Century Estate Planning: Practical Applications

Listen to the Wealth Management Audio Series assignments

- Growing Your Business With Ted Ridlehuber
- 13 Wealth Management Issues With Phil Buchanan

Complete the e-Learning Lessons

- Surfacing the Issues Video Vignettes
- Knowing Your Client Issues
- Case Studies
- Comprehensive Video Case Study

Prepare for the Capstone Project

- An ongoing inventory exercise for later use in final project planning:

1. What are the key new knowledge points I have received from this lesson?
2. What are the new issues I now plan to use in my client interviews and client situation analyses relating to investments?
3. What process will I put in place to ensure I address the investments issues with clients?
4. What are the resources I will use in analyzing client interactions and creating recommendations (list personal, firm, and outside resources)?
5. What are the knowledge gaps that I will commit to filling to support my understanding of investments issues to better serve my clients (i.e., products, types, vendor, taxation, etc.)?

Upon completion of each Module, participants will assess their knowledge with a Mastery Exam

Online

Covering Module Contents

Passing Score of 85%

Participate in 2-day Instructor-led Session

Client Interaction Skills *(CWS® II)*

- **Delivery and Application**
- **Branding**
- **Interviewing**
- **Presentations**

Complete the Capstone Project: On-Going

The Capstone Project includes a business plan and case study that demonstrates use of the knowledge and skills acquired during the Certified Wealth Strategist® program. Your Capstone Project will articulate your action steps for:

Client Interactions – including as appropriate topics, tools, and scripts

Business practices changes, actions, and tools

Resources, source, and location

Knowledge inventory, gaps and solutions, plan for continued study

All plans are evaluated against a rubric to determine if the applicant has successfully addressed all aspects of comprehensively managing wealth issues for clients with a plan for implementation.