CWS® Roadmap

This Roadmap shows the required elements for you to attain the Certified Wealth Strategist® designation. The entire designation should take <u>*between 26-32 weeks to complete*</u> *if you follow the roadmap provided. Designed as a checklist, the roadmap is in the order you should follow for the next 25 weeks to complete the lessons of the Directed Study portion of the course of study. In general, it should take you 2½ weeks to complete each of the lessons within the 4 modules and you should strive to complete all the modules and the 4 mastery exams* <u>*before*</u> *you attend the second instructor-led session on client interaction skills.*

Instructor-Led Classroom Session I
CWS® Practice Management Skills *(Growing Your Business I)*

- √ Introduction to CWS®
- √ Practice Management for the Certified Wealth Strategist®
- √ Receive CWS® program materials 10 days after GYB I
- √ Receive Cannon Financial Institute LMS logon information

Prework for Directed Study

- □ Listen to Audio CD: Growing Your Business Disc 1
- □ Listen to Audio CD: Growing Your Business Disc 2
- □ Listen to Audio CD: Growing Your Business Disc 4
- □ Listen to Audio CD: Growing Your Business Disc 5
- □ Listen to Audio CD: Growing Your Business Disc 6

Directed Study

Module 1 **(approx. 5 weeks of Directed Study)**

Lesson 1 Investment Issues of Affluent and High Net Worth Clients

- □ Listen to Audio CD: Growing Your Business With Ted Ridlehuber Disc 3
- □ Listen to Audio CD: The 13 Wealth Management Issues Disc 1
- □ Read Investments Issues Study Guide Core Materials
- □ Read <u>Cannon Concept</u> References in the Study Guide
- □ Complete the Case Studies in the Study Guide
- □ Complete Self-Assessment in the Study Guide
- □ Logon and Complete the Investments e-Learning Lesson

Lesson 2 Liabilities, Debt, and Lending Issues of Affluent and High Net Worth Clients

- □ Listen to Audio CD: The 13 Wealth Management Issues Disc 4
- □ Read Liability, Debt, and Lending Issues Study Guide Core Materials
- □ Complete the Case Studies in the Study Guide
- □ Complete Self-Assessment in the Study Guide
- □ Logon and Complete the Liability e-Learning Lesson

□ Logon and Complete **Module 1 Online Mastery Exam**

Module 2 **(approx. 7 ½ weeks of Directed Study)**

Lesson 1 Insurance Issues of Affluent and High Net Worth Clients

- □ Listen to Audio CD: The 13 Wealth Management Issues Disc 2
- □ Read Insurance Issues Study Guide Core Materials
- □ Read Cannon Concept References in the Study Guide
- □ Complete the Case Studies in the Study Guide
- □ Complete Self-Assessment in the Study Guide
- □ Logon and Complete the Insurance e-Learning Lesson

Lesson 2 Compensatory Stock Options Issues of Affluent and High Net Worth Clients

- □ Listen to Audio CD: The 13 Wealth Management Issues Disc 4
- □ Read Compensatory Stock Options Issues Study Guide Core Materials
- □ Complete the Case Studies in the Study Guide
- □ Complete Self-Assessment in the Study Guide
- □ Logon and Complete the Executive Compensation e-Learning Lesson

Lesson 3 Titling of Assets, Choice of Executor / Trustee, Durable Power of Attorney Issues of Affluent and High Net Worth Clients

- □ Listen to Audio CD: The 13 Wealth Management Issues Disc 6
- □ Read the Study Guide Core Materials
- □ Read Cannon Concept References in the Study Guide
- □ Complete the Case Studies in the Study Guide
- □ Complete Self-Assessment in the Study Guide
- □ Logon and Complete the Protection Strategies e-Learning Lesson

□ Logon and Complete **Module 2 Online Mastery Exam**

Module 3 (approx. 10 weeks of Directed Study)

Lesson 1 Qualified Retirement Plan – IRA Distribution Issues of Affluent and High Net Worth Clients

- □ Listen to Audio CD: The 13 Wealth Management Issues Disc 3
- □ Read Qualified Retirement Plan – IRA Distribution Issues Study Guide Core Materials
- □ Read Cannon Concept and 21st Century Estate Planning References in the Study Guide
- □ Complete the Case Studies in the Study Guide
- □ Complete Self-Assessment in the Study Guide
- □ Logon and Complete the IRA/QRP e-Learning Lesson

Lesson 2 Business Succession Planning Issues

- □ Listen to Audio CD: The 13 Wealth Management Issues Disc 5
- □ Read Business Succession Planning Issues Study Guide Core Materials
- □ Read Cannon Concept References in the Study Guide
- □ Complete the Case Studies in the Study Guide
- □ Complete Self-Assessment in the Study Guide
- □ Logon and Complete the Business Succession Planning e-Learning Lesson

Lesson 3 Gifting During Life Issues of Affluent and High Net Worth Clients

- □ Listen to Audio CD: The 13 Wealth Management Issues Disc 7 on Gifting to Children/Descendant During Life
- □ Read Gifting During Life Issues Study Guide Core Materials
- □ Read Cannon Concept and 21st Century Estate Planning References in the Study Guide
- □ Complete the Case Studies in the Study Guide
- □ Complete Self-Assessment in the Study Guide
- □ Logon and Complete the Gifting to Children and Descendants e-Learning Lesson

Lesson 4 Charitable Gifting Issues of Affluent and High Net Worth Clients

- □ Listen to Audio CD: The 13 Wealth Management Issues Disc 7 on Charitable Gifting During Life and Charitable Inclination
- □ Read Charitable Gifting Issues Study Guide Core Materials
- □ Read Cannon Concept and 21st Century Estate Planning References in the Study Guide
- □ Complete the Case Studies in the Study Guide
- □ Complete Self-Assessment in the Study Guide
- □ Logon and Complete the Charitable Gifting e-Learning Lesson

□ Logon and Complete **Module 3 Online Mastery Exam**

Module 4 (approx. 2 ½ weeks of Directed Study)

Lesson 1 Distribution Plans at Death for Tax Efficiency and Control

- □ Listen to Audio CD: The 13 Wealth Management Issues Disc 8
- □ Read Distribution Plans at Death Study Guide Core Materials
- □ Read Cannon Concept and 21st Century Estate Planning References in the Study Guide
- □ Complete the Case Studies in the Study Guide
- □ Complete Self-Assessment in the Study Guide
- □ Logon and Complete the Distribution Plans at Death e-Learning Lesson

□ Logon and Complete **Module 4 Online Mastery Exam**

Instructor-Led Classroom Session II

Client Interaction Skills *(Growing Your Business II)* and the Capstone Project

- □ Client Interaction Skills for the Certified Wealth Strategist® -- Interviewing, Gap Analysis, Presentation Skills, Action Planning
- □ Receive Capstone Project Booklet (via email)

Capstone Project

Complete by: Recommended 30 days after Client Interaction Skills Class

- □ Submitted
- □ Evaluated and Approved

Certified Wealth Strategist® Designation

- □ Awarded