

# Master of Science in Wealth Management

Where professionals harness  
growth to nurture wealth

Tay Yu Jin  
Class of 2019  
Deputy Head of Private Banking,  
EFG Bank AG, Singapore Branch



# WHY SMU MASTER OF SCIENCE IN WEALTH MANAGEMENT (MWM)?



- 1 Industry relevance with an Asian focus**

Benefit from a progressive curriculum, constantly reviewed to reflect industry standards, along with the knowledge and expertise of luminary industry professionals. The SMU MSc in Wealth Management is also accredited with the IBF Standards for Private Banking.
- 2 First in Asia, Third in the world**

Find value in Asia's most established Wealth Management masters ranked 1st in Asia and 3rd in the world by the Financial Times Masters in Finance Post-experience Ranking 2022.
- 3 Tri-continental study experience**

Develop a global outlook with study stints in Singapore (Singapore Management University), United States of America (The Wharton School - University of Pennsylvania) and Switzerland (University of St.Gallen).
- 4 Accelerate growth and widen horizons**

Expand your global network with a close-knit SMU alumni network of more than 700 alumni worldwide. Stay connected through internships and career placements in established companies and financial institutions.



Watch the video to learn more about the MWM Programme



**“The journey with SMU was phenomenal and has enabled me to fulfil my personal goal and achieve career growth. The knowledge gleaned from the programme has improved the conversations I have with clients. In addition to broadening my thinking horizon, I also got to learn from my younger classmates who were adept at picking up the course content and the experience has enriched me as a person with their willingness to share.”**

Angela Koh, Class of 2019  
Executive Director, UBS



**“The Master of Science in Wealth Management is an investment that puts you ahead of your peers, and equips you with relationship management skills that become a huge asset to any professional in the wealth management industry.”**

Daniel Low, Class of 2014  
Director, DBS Private Bank



# A UNIQUE GLOBAL EXPERIENCE

Students of the Master of Science in Wealth Management programme will have a unique tri-continental experience as they embark on study stints, not only in SMU but also in The Wharton School of the University of Pennsylvania in the U.S. and the University of St.Gallen in Switzerland. Such study stints in our partner institutions enable our students to develop a global outlook and broaden their network with peers from different parts of the world. More importantly, they will get the opportunity to learn from and interact with distinguished faculty from these renowned institutions.



## Singapore: Singapore Management University

Taught by eminent faculty from SMU, students will graduate with the MSc in Wealth Management degree awarded by SMU upon graduation.



**Andrew Lee**  
Associate Professor of  
Accounting (Practice)



**Benedict Koh**  
Professor of Finance (Education);  
Associate Dean,  
Pre-Experience  
Postgraduate Programmes



**Edward Ti**  
Assistant Professor of Law



**Mandy Tham**  
Associate Professor of Finance  
(Education); Academic Director,  
Master of Science  
in Wealth Management





## USA: Aresty Institute of Executive Education, The Wharton School of the University of Pennsylvania

Taught by distinguished faculty on approaches to managing family wealth, alternative investing, impact investing, and the landscape of philanthropy and common philanthropic vehicles, students will receive a Certificate of Participation in the Executive Programme in Alternatives, Sustainability, Impact Investing, and Philanthropy.



### Christopher C. Geczy

Adjunct Professor of Finance; Academic Director, Wharton Wealth Management Initiative; Academic Director, Jacobs Levy Equity Management Center for Quantitative Financial Research, The Wharton School



### Craig Mackinlay

Joseph P. Wargrove Professor of Finance, The Wharton School

## Switzerland: University of St.Gallen

Taught by leading faculty in European Banking, family businesses, succession planning, and family offices, students will receive a Certificate of Participation in the Executive Programme in European Family Businesses and Family Offices.



### Stefan Morkötter

**Prof. Dr.**  
Professor of Finance;  
Director, SGI-HSG,  
St.Gallen Institute of Management in Asia



### Thomas Zellweger

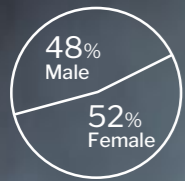
**Prof. Dr.**  
Full Professor of Business Administration with specialisation in Family Business; Managing Director KMU-HSG,  
Managing Director CFB-HSG,  
Vice-President (University of St.Gallen), Research & Faculty





# CLASS PROFILE

Discover where your degree can take you, and the profile of great minds you could be networking with.



Gender  
**12:13**



Average Age  
**31**



International Students  
**68%**

Nationalities  
**16**



Average Years of Work Experience  
**6.6**

*Student profiles taken from Classes of 2018-2020*

# INDUSTRIES MWM GRADUATES WORK IN



Financial Services (Banks) **51%**



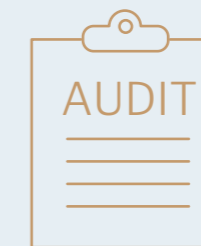
Financial Services (Asset / Investment Management) **19%**



Financial Services (Others) **11%**



Technology **7%**



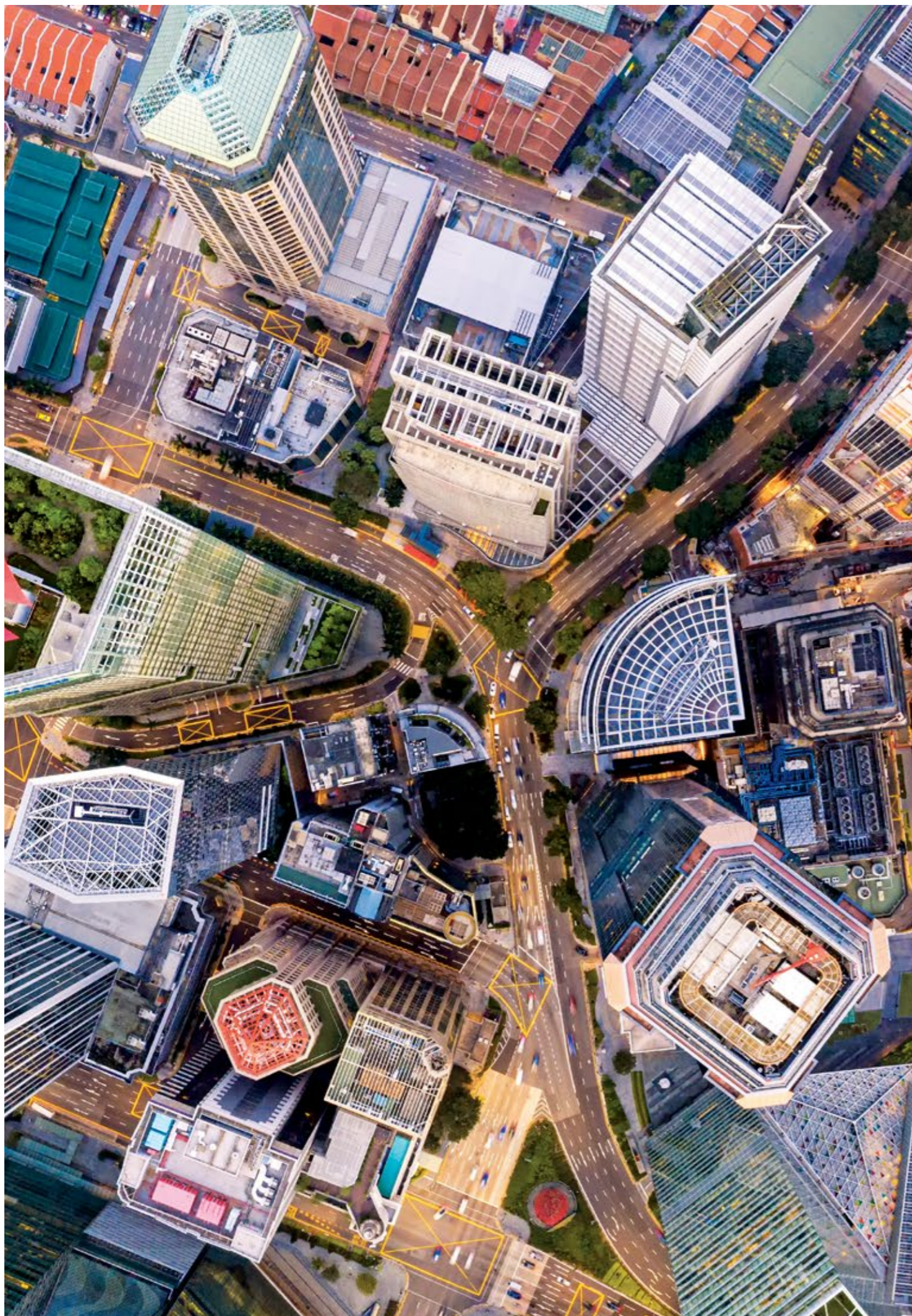
Audit / Accounting **4%**



Others **8%**

*Student profiles taken from Classes of 2018-2020.*





# PROGRAMME CALENDAR\*

The MWM is a 12-month full-time programme, conducted over 5 study blocks.

Jul	Aug	Oct	Jan	Mar	Apr - May
Preparatory Modules <b>SMU</b>	Study Block I <b>SMU</b>	Study Block II <b>SMU</b>	Study Block III <b>SMU</b>	Study Block IV <b>HSG &amp; Wharton**</b>	Study Block V <b>SMU</b>
— Study Trips — — Role-Play —					
<b>Internship***</b>					

The graduation requirement is 15 Credit Units (CUs) and a minimum CGPA of 2.5. The core curriculum consists of 15 CUs.

\* The programme reserves the right to amend as deemed appropriate and dates are subject to change

\*\* Partner universities are subject to change

\*\*\* Internship is optional and can be done any time during the period of study

# PROGRAMME INFORMATION\*

## PREPARATORY MODULES

<b>Jul Prep &amp; Induction</b>	<ul style="list-style-type: none"> <li>• Boot Camp</li> <li>• Orientation</li> <li>• Team Building</li> </ul>
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## CORE MODULES

<b>Aug Study Block I</b>	<ul style="list-style-type: none"> <li>• Corporate Finance</li> <li>• Financial Statement Analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Macroeconomics &amp; Global Financial Markets</li> <li>• Quant Methods for Investment Analysis</li> </ul>
<b>Oct Study Block II</b>	<ul style="list-style-type: none"> <li>• Analysis of Equities and ETF</li> <li>• Analysis of Fixed Income</li> <li>• Analysis and Application of Derivatives</li> </ul>	
<b>Jan Study Block III</b>	<ul style="list-style-type: none"> <li>• Advanced Topics in Wealth Management</li> <li>• Financial Advisers Law &amp; Compliance</li> </ul>	<ul style="list-style-type: none"> <li>• Portfolio Management</li> <li>• Wealth Planning</li> </ul>
<b>Mar Study Block IV (HSG &amp; Wharton)</b>	<ul style="list-style-type: none"> <li>• Advanced Wealth Planning</li> <li>• Alternative Investing</li> <li>• European Family Offices</li> </ul>	<ul style="list-style-type: none"> <li>• Fintech in Wealth Management</li> <li>• Private Equity &amp; Venture Capital</li> </ul>
<b>Apr-May Study Block V</b>	<ul style="list-style-type: none"> <li>• Client Book Building</li> <li>• Client Relationship Management</li> <li>• Investment Management in Family Offices</li> </ul>	<ul style="list-style-type: none"> <li>• Seminar in Wealth Management + CFA Ethics online</li> <li>• Structured Products</li> </ul>

\* The programme reserves the right to amend as deemed appropriate.





# ADMISSIONS AND APPLICATION

- Good undergraduate degree
- Minimum working experience (post-Bachelor's degree) of 2 years (waived for applicants who have passed CFA Level 1)
- Good score in GMAT/GRE or SMU Admissions Test\*
- A valid TOEFL/IELTS score is required if the medium of instruction of your undergraduate studies was not in English

\*Alumni of SMU or local Autonomous Universities (AUs) who have graduated with a bachelor's degree in the past 5 years with a cumulative GPA of 3.4 or higher, can use their undergraduate GPA in place of the SMU Admissions Test.

## FEES

Application Fee	Registration Fee	Tuition Fee
\$S\$100 inclusive of GST	<ul style="list-style-type: none"> <li>• Singaporeans and PRs: \$S\$400 inclusive of GST</li> <li>• International Applicants: \$S\$500 inclusive of GST</li> </ul> <i>Amount payable upon acceptance to the programme</i>	\$S\$65,400 inclusive of GST  <i>Fees are subject to change from year to year</i>

All fees are non-refundable and non-transferable. A deposit of \$S\$7,000 would be required upon acceptance of offer into the programme. The remaining tuition fees would be billed thrice over the duration of the programme. The fees are due and payable within 30 days of the billing. The tuition fees exclude accommodation, airfare and living expenses during the 2-week overseas study block in Switzerland and USA. Estimated budget of \$SGD\$5,000 is required for these expenses. SMU alumni will be entitled to a discount off the tuition fee. GST will still apply for the discounted tuition fee.

## SCHOLARSHIPS

Partial scholarships for the MSc in Wealth Management (MWM) programme entail award amounts of up to 30% of the tuition fee, with no bonds attached. GST will still apply for the full tuition fee before the scholarship award.

### The scholarship categories include:

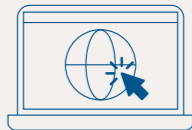
Academic Excellence\* | Community Impact | Global Awareness\* | Leadership | Impact On Asia | Women in Business

\*All candidates are automatically submitted for consideration for Academic Excellence and Global Awareness scholarships upon meeting the scholarship criteria.

Goods and Services Tax (GST) is a tax collected on behalf of Singapore Government and will be charged at the prevailing rate.

## THE FOLLOWING AWARDS ARE OPEN TO ALL MWM STUDENTS:

- Bank Julius Baer Investment Game
- Portcullis Wealth Management Prize
- Bank of Singapore Professional Wealth Practitioner Award
- SMU-Silverdale Award for Excellence in Fixed Income
- BNP Paribas



Visit our programme website for more details on the eligibility criteria.

Speak to Admissions Advisor



Apply Now



# MWM TALENT DEVELOPMENT (MWMTD) SCHOLARSHIP

The SMU MWM is committed to building a pipeline of mid-career financial professionals from private banks. The MWM Talent Development Scholarship is awarded to eligible individuals who are currently working for a private bank or related financial institution with at least 5 years of financial/wealth management experience.

## MWM TUITION FEES<sup>1</sup>: S\$65,400 (inclusive of GST)

<sup>1</sup>Exclude accommodation, airfare and living expenses during the 2-week overseas study block in Switzerland and USA. Estimated SGD\$5,000 required for these expenses.

## MWMTD SCHOLARSHIP QUANTUM: S\$18,000

### Terms & Conditions:

- The Scholarship is bond-free
- All application documents must be submitted to Singapore Management University by the application deadline, and successful candidates must matriculate and start the MWM in the same applied intake.
- No deferment, withdrawal, leave of absence during the one-year study is allowed.

Candidates are automatically submitted for consideration for MWMTD scholarship upon meeting the scholarship and application criteria. Scholarship is awarded on a highly selective and competitive basis.

### Fees Illustration

Effective Fees with Corporate Partners Discount, Alumni/Referral Discount, and MWMTD Scholarship.

	Scenario A	Scenario B	Scenario C
Full Tuition Fee (excluding GST)	S\$60,000		
Corporate Partner Discount*	S\$12,000		
Corporate Partner Discount**		S\$9,000	
Alumni Discount or Referral Discount***			S\$5,000
MWMTD Scholarship	S\$18,000		
Effective Fees (including GST)	S\$34,320	S\$37,590	S\$41,950

\* If 2 or more company-sponsored (fully/partially) candidates from the same organisation are enrolling into the same intake, each will enjoy a 20% discount.

\*\* If a company which has previously sponsored (fully/partially) an employee, and the same company is sponsoring (fully/partially) another employee into the programme at a subsequent intake, that employee will enjoy a 15% discount off the total tuition fee.

\*\*\* Graduates from SMU undergraduate or postgraduate programmes are eligible to obtain a S\$5,000 discount when applying to the MWM programme. Alternatively, candidates with a referee report completed by a SMU student/alumni during application, in accordance with the admissions criteria, are eligible to obtain a S\$5,000 discount when applying to the MWM programme.

IBF-STF Funding will range from S\$17,000<sup>^</sup> to S\$19,400<sup>^</sup> for Singaporeans and Singapore PRs who have successfully completed the SMU MWM programme. Eligible students will receive the funding as a reduction from the third billing of the tuition fees.

<sup>^</sup>The fees are subjected to IBF accreditation approval for all modules. Singapore Management University reserves the right to amend as deem appropriate.

# MWM TALENT DEVELOPMENT SCHOLARSHIP RECIPIENTS



“To embark on a journey of education later in life is never just about acquiring new skills or the opportunity to make new connections; it is also a personal challenge. Having heard so much about the rigour of the SMU MWM programme, I was both thrilled and terrified to have been accepted. The continued guidance and encouragement of the faculty were invaluable, making the journey worth it.”

Felicia Wee, Class of 2022  
Chief Operating Officer, Corporate Services, Portcullis (Singapore) Pte Ltd



“Wealth management practitioners today face numerous challenges, from increased financial market volatility to changing regulatory requirements and a shift in demographics among clients. Continuous learning is key to be able to competently manage the increasingly complex and sophisticated demands of the industry and meet the needs of clients. The Master of Science in Wealth Management programme provides a holistic overview of the knowledge required of a wealth manager and it provides the platform for industry practitioners to share, learn and interact with each other.”

Lily See, Class of 2022  
Team Head, Bank of Singapore



“I graduated from SMU’s MSc in Applied Finance in 2007 and MWM is my second master’s programme with SMU. I thoroughly enjoyed my time in SMU especially with its unique pedagogy and culture of strong student-professor interaction. I also benefitted from the strong support from the industry and practitioners, C-level executives who come in regularly to share their experience and knowledge with the class.”

Toto Tan, Class of 2022  
Associate Director, Wealth Planning Manager, Citibank



“I chose the SMU MWM programme because it is amongst the top 3 programmes in wealth management globally. Discussions with fellow classmates conducted during our small-seminar style classes sharpened my knowledge on industry concepts. With the campus right at the doorstep of Singapore’s Central Business District, it is convenient for me to attend classes while working in my full-time job.”

Keeve Tan, Class of 2022  
Managing Director (Greater China & North Asia), Bank of Singapore



# SMU - IN THE HEART OF SINGAPORE, IN THE HEART OF ASIA

In the dynamic, cosmopolitan hub that is Singapore, you will find a vibrant city-state that pulses with the diversity of both East and West. Situated at the crossroads of the world, Singapore is home to multinational companies and thousands of small and medium-sized enterprises flourishing in a smart city renowned for its business excellence and connectivity. With its strong infrastructure, political stability, and respect for intellectual property rights, this City in a Garden offers you unique opportunities to develop as a global citizen.

Tapping into the energy of the city is a university with a difference – the Singapore Management University. Our eight schools: School of Accountancy, Lee Kong Chian School of Business, School of Computing and Information Systems, School of Economics, College of Graduate Research Studies, College of Integrative Studies, Yong Pung How School of Law, and School of Social Sciences, form the country's only city university campus, perfectly sited to foster strategic links with businesses and the community.

SMU generates leading-edge research with global impact and produces broad-based, creative and entrepreneurial leaders for a knowledge-based economy. Discover a multi-faceted lifestyle right here at SMU, in the heart of Singapore.



## ABOUT THE LEE KONG CHIAN SCHOOL OF BUSINESS

SMU commenced its curriculum in 2000 with the School of Business, which welcomed its pioneer cohort of students in August 2000. In 2004, the Lee Foundation contributed S\$50 million to SMU in honour of the late Dr Lee Kong Chian, a well-known Southeast Asian businessman, philanthropist and community leader. In recognition of the Lee Foundation's generosity, SMU named in perpetuity the School of Business, the building and the university-wide scholars programme after Dr Lee Kong Chian.

Today, the Lee Kong Chian School of Business is a dynamic Asian business school with more than 5,000 students and over a hundred full-time faculty members with doctorate degrees from renowned universities such as Cornell, Harvard, INSEAD, London Business School, Wharton, Oxford, Stanford and Yale. The school offers undergraduate, postgraduate and doctoral programmes and is affiliated with a number of research centres such as the Sim Kee Boon Institute for Financial Economics and the Institute for Innovation and Entrepreneurship.

## SCHOOL RANKINGS

- 1st Triple Accredited Business School in Singapore (AACSB, AMBA, EQUIS)
- Ranked 6th Business School in Asia-Pacific (2018 Financial Times Asia-Pacific Business School Rankings)
- Ranked 1st in Singapore, 2nd in Asia, 35th Worldwide (2021 University of Texas Dallas Research Rankings)
- Ranked 31st in Finance, 43rd in Management and 48th in Business Administration (2020 Shanghai Ranking Global Ranking of Academic Subjects [GRAS])
- Ranked 3rd for MSc in Wealth Management (2022), 22nd for Executive MBA (2020), 40th for MSc in Applied Finance (2022), 41st for MSc in Management (2023), and 51st for MBA (2022) by the Financial Times Global Rankings





# THE SMU MASTERS ADVANTAGE



## GLOBAL RECOGNITION

SMU is globally recognised as one of the best specialised universities in Asia and the world. Its research rankings, programme rankings, accreditations and professional recognition are testaments to its achievements and standing.



## INTERACTIVE PEDAGOGY

SMU's interactive, seminar-style pedagogy brings you stimulating, multidisciplinary learning under the mentorship of the thought leaders and subject experts who make up our faculty. You will hone your analytical skills, teamwork and communication skills.



## INNOVATIVE CURRICULUM

Stay relevant with courses that combine cutting-edge research and up-to-date knowledge with best business practices. SMU's Postgraduate Professional Development Course and award-winning Asian case studies help you approach topics from different practical perspectives for greater insights.



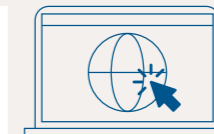
## NETWORKING AND CAREER OPPORTUNITIES

SMU has a diverse student population from many different countries, bringing equally diverse personal and professional experience into your network. Take advantage of comprehensive guidance from our dedicated career services to aid your career transition or advancement.



## CITY CAMPUS

SMU is nestled within the arts and heritage precinct, right next to the Central Business District, with unrivalled connectivity for public transport and multiple amenities around campus. Discover how life beyond the classroom is as enriching as within.



For a full listing of SMU Masters programmes, visit [masters.smu.edu.sg/programmes](https://masters.smu.edu.sg/programmes)



# BE PART OF A ROBUST ALUMNI NETWORK

The SMU MSc in Wealth Management (MWM) Alumni Group is dedicated to fostering a vibrant network among alumni, current students, and industry partners. To achieve this, we work closely with the MWM Programme Office, MWM Advisory Board, Office of Alumni Relations, SMU Career Office, and the LKCSB Recruitment & Admissions team. Our goal is to establish a robust and collaborative community that benefits all members by facilitating meaningful connections and opportunities for growth.

## Why SMU MWM Alumni Group?

### Build Community

To foster a strong alumni identity and community among all SMU MWM cohorts, connecting current students with alumni, and facilitating collaborations among alumni, students, and industry partners for mutual benefit.

### Enhance Recognition

To elevate SMU MWM's presence both locally and regionally, we will actively engage in wealth management markets, offer attractive internships and career opportunities, and foster talent in the field of wealth management.

### Enrich Individuals

To support SMU MWM alumni in their lifelong learning and professional development through social, professional, and educational events that involve students, faculty, advisory board, alumni, and industry partners.

### Impact Society

To bolster the SMU MWM's societal impact through industry thought leadership and advocacy, sponsorship and partnership, volunteerism, and mentorship. Additionally, to serve the community in fundraising, bursary grants, and active involvement in the programme, University, and industry initiatives.

## Meet the SMU MWM Alumni Group



### Jed Khoo

President  
Class of 2004



### George Lam

Vice-President  
Class of 2004



### Jaclyn Kaur

Outreach, Recruitment & Admissions Co-Lead  
Social Media Lead  
Class of 2022



### Harshvardhan Bidasaria

Outreach, Recruitment & Admissions Co-Lead  
Class of 2022



### Lily See

Internship & Placement  
Career Co-Lead  
Class of 2022



### Tan Keat Wai

Internship & Placement  
Career Co-Lead  
Class of 2022



### Guan Qi

Internship & Placement  
Career Co-Lead  
Class of 2022



### Jay See

Internship & Placement  
Career Co-Lead  
Class of 2013



### Young Li

Events Co-Lead  
Class of 2021



### Fang Shuai

Events Co-Lead  
Class of 2019








SMULKCSB



**Singapore Management University**  
**Lee Kong Chian School of Business, Postgraduate Admissions**  
**50 Stamford Road, Singapore 178899**

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