Postgraduate Diploma in Private Wealth Advice (Cohort 5)

The course content can be accessed from **7 September 2026**

Welcome & Getting Started 10 September 2026 @ 13:00-14:30 (UK time)

2 - 3 October 2026	
Masterclass 1: Strategic Risk Management for Leaders **By Jonathan Bowdler**	Friday 13:00 - 17:00 (UK time)
Masterclass 2: Family Business Advising **By Daniel Trimarchi**	Saturday 09:00 - 13:00 (UK time)

Reflective Journal Draft Submission – 2 November 2026
(Feedback due 18 December 2026)

6 – 7 November 2026	
Masterclass 3: Digital Assets **By Leigh Sagar**	Friday 13:00 - 17:00 (UK time)
Masterclass 4: Trust Disputes **By Toby Graham**	Saturday 09:00 - 13:00 (UK time)

Assessment Preparation – 18 November 2026 (9:30-11:00 UK time)

4 – 5 December 2026	
Masterclass 5: Cross-Border Succession **By Michael Wells-Greco**	Friday 13:00 - 17:00 (UK time)
Masterclass 6: Strategic Philanthropy **By Maya Prabhu**	Saturday 09:00 - 13:00 (UK time)

8 - 9 January 2027	
Masterclass 7: International Taxation & Information Exchange **By John Shoemaker**	Friday 13:00 - 17:00 (UK time)
Masterclass 8: Compliance for Trustees **By Robin McGhee**	Saturday 09:00 - 13:00 (UK time)

Leadership and Strategy Sessions

5 - 6 February 2027	
Leadership and Judgement **By Freek Vermeulen**	Friday 13:00 - 15:30 (UK time)
Sales and Marketing **By Katie King**	Saturday 09:00 - 11:30 (UK time)

Assessment Deadlines

Reflective Journal Deadline – 1 March 2027
1,000 – 1,500 words commentary per masterclass to include notes on the case study outcomes

Oral Assessment – Taking place from 30 March – 9 April 2027

Results to be released on 14 May 2027