

Postgraduate Diploma in Private Wealth Advice (Cohort 5)

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

We will continue to take enrolments up to the 25 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