

Syllabus: Qualified Family Office Professional (QFOP) – CRN# 40745

Program Coordinators: Richard Wilson; Theo O'Brien
Location: 100% Online-Based
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Time: Self-Paced Program

Program Aim: To understand best practices and guidelines to becoming an industry-leading family office expert and professional.

Learning Objectives of the QFOP:

1. To provide participants with a comprehensive understanding of the family office business model, line of services, operations, multi-generational wealth planning, and holistic approach to managing capital for the ultra-affluent.
2. To ensure that graduates leave the program with a basic understanding of investment banking, hedge fund investment strategies, private equity, venture capital, financial analysis, and financial modeling.
3. To provide participants with a sense of confidence in how other family offices around the globe are investing their capital, managing portfolios, and conducting due diligence on investment opportunities and fund managers.

Program Requirements:

1. Completion of the online QFOP examination as described in the QFOP Study Guide.
 - a.) Examination: The examination is 320 multiple choice questions long within a timed and secure online testing environment.
2. Self-Management: The Qualified Family Office Professional (QFOP) designation is a self-study certification program. Though we want to see you succeed, your success depends on and directly corresponds to the amount of effort and time you put into learning the material. We have implemented the necessary tools to assist you in studying, such as a study guide with defined and in-depth topics and terms to know, as well as a 50 question practice exam to help you gauge your grasp of the information in the texts. We have also created videos on family office business development, investing, due diligence, manager selection, operations, fundamentals as well as the various investment areas that family offices often invest in such as private equity, hedge funds and real estate in order to supplement the reading material.
3. Time-Management: As the QFOP is a self-study program, it is your responsibility to make time to read the required texts and to ask questions as they arise.

4. **Exam time:** Examinations are offered four times a year on January 15th, April 15th, July 15th, and October 15th each year. Please email us once you are ready to schedule your examination. You will have three hours to complete your examination through our online testing environment.

Required Text: The following book is available online and in most bookstores. Amazon.com carries the required text below:

1. Richard C. Wilson, **The Family Office Book: Investing Capital for the Ultra-Affluent** (Wiley Finance), First Edition. 978-1118185360.ISBN's.

Required Tools: Internet access and an Internet browser are required to take the online exam. (Internet Explorer and Firefox work best, though most browsers should suffice.)

Exam: (100 points)

- 320 multiple choice/true-false questions—with 300 of the questions counting for 1/3 point each and the remaining 20 will be used for beta testing questions (100%)

For more information, study tips, and topics, please see the QFOP study guide.