

CERTIFICATE IN WEALTH MANAGEMENT

Overview

This certificate is designed for students who are seeking a career change to Wealth Management, or students wishing to advance in their present careers. The certificate begins with core classes and finishes with advanced electives in Wealth Management. The classes offered are already approved and are part of the curriculum of the Master of Science in Finance program.

Thus, students completing the certificate have an option to take additional classes to obtain a complete M.S. in Finance degree. Additionally, an individual certificate in each track can be earned for those students who do not wish to complete the full degree at this time. Each certificate has 8 credits from four courses. M.S. in Finance has 35 credits.

Admission Requirements

- Completed application for admission submitted through BusinessCAS
- A baccalaureate degree from an accredited institution
 - Official academic transcripts from all previously attended post-secondary institutions must be submitted directly to BusinessCAS.
 - International applicants must have their educational credentials from institutions outside of the United States verified by an approved international credentialing evaluation service such as World Education Services to confirm degree equivalency and GPA calculation.
- Statement of purpose and short-essay responses to the career goal and program-related questions in BusinessCAS
- A current resume outlining your professional and/or academic achievements.
- At least one letter of recommendation is required. Up to three may be submitted.
- Official GMAT (or GRE) score to be sent directly to the University of Miami Herbert Business School by using the relevant code below. GMAT/GRE waivers can be granted on a case-by-case basis. Should you wish to request a waiver, in your BusinessCAS application make sure to "opt-out" of submitting a test score. You will then need to upload a page summary of why you should be considered for a waiver.
 - GMAT Institution Code is 7NV-S1-00
 - GRE Institution Code is 5815
 - Between the GMAT and GRE, there is no preference between the two tests for specialized masters' admissions.
- An official TOEFL or IELTS score is required as proof of English proficiency for international applicants who did not receive a degree in the United States or a foreign country where English is the primary language. The following minimum score is required for admission to a graduate business degree program.
 - TOEFL - 94 or above Institution Code: 5815
 - IELTS - 7.0 or above Institution Code: 4861

If you do not yet have a GMAT or GRE score and/or TOEFL or IELTS score (international candidates only), you may complete and submit your application prior to taking the exam by indicating your approximate date within the Standardized Tests tab in the Academic History section. Select "Add Test Score" by the relevant test, then indicate that you have not yet taken the exam and add your estimated test date in the section provided.

We encourage candidates to upload unofficial transcripts and test scores (if required) with their BusinessCAS application in order to expedite the review of their file while official documents are processed.

QUESTIONS?

Connect with Miami Herbert Business School's graduate enrollment advisors at (305) 284-2510, by email at mba@miami.edu, or visit the Miami Herbert Business School website (<https://herbert.miami.edu/graduate/find-and-compare-programs/finance/>).

Curriculum Requirements

Code	Title	Credit Hours
FIN 668	Wealth Management and Financial Planning	2
FIN 651	Quantitative Stock Portfolio Management	2
FIN 653	Alternative Investments	2
FIN 679	Private Equity and Venture Capital	2
Total Credit Hours		8

Mission

The mission of the wealth management program is to train students in skills to help high-net-worth families preserve and grow their wealth, manage risk, and perform tax, investment, insurance, retirement, and estate planning.

Student Learning Outcomes

- Understand the service that wealth managers provide to clients.
- Implement tax-efficient strategies.
- Differentiate asset classes and construct strategic asset allocation based on the client's risk tolerance, return expectations, time horizon, tax situation, liquidity needs, legal constraints, and unique circumstances.