



Wealth Management

Program Details



WMSSM Designation [\(edit\)](#)

Wealth Management SpecialistSM - WMSSM

Develop the skill set needed by experienced planners with the WMSSM designation program from **College for Financial Planning[®]—a Kaplan Company.**





WMSSM Program Overview

The Wealth Management SpecialistSM (WMSSM) program equips your staff with a substantial overview of the most critical concepts in financial planning and wealth management without the rigors of the CFP[®] certification or a more comprehensive professional designation.

[Enroll in the WMSSM >](#)

WMSSM Course Topics

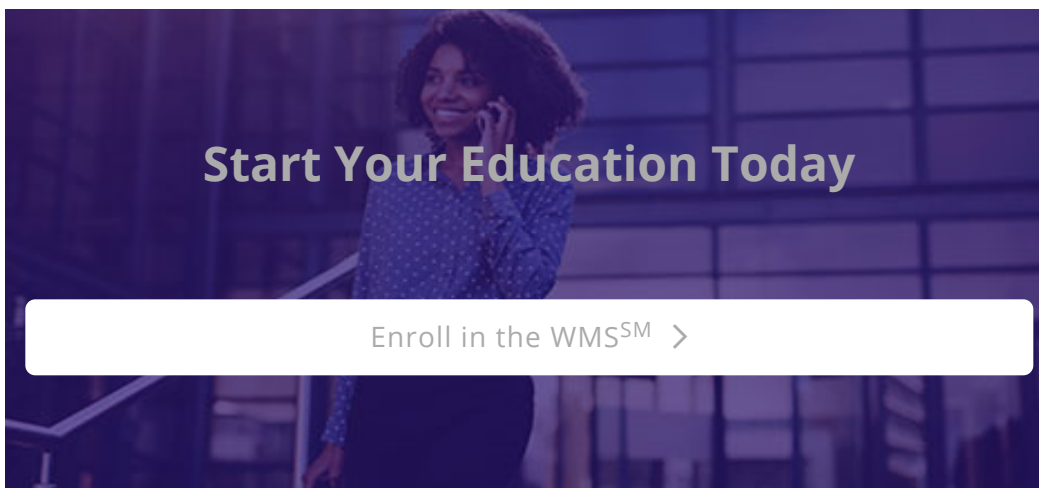
- ⊕ [WMSSM Course 1: Fundamental Considerations in the Wealth Management Process](#)
- ⊕ [WMSSM Course 2: Time Value of Money Principles](#)
- ⊕ [WMSSM Course 3: Measurement of Risk and Return](#)
- ⊕ [WMSSM Course 4: The Asset Allocation Process](#)
- ⊕ [WMSSM Course 5: Investment Strategies](#)
- ⊕ [WMSSM Course 6: Tax Implications and Strategies in the](#)

- ~~WMSSM Course 6: Tax Implications and Strategies in the Financial Planning Process~~
- ⊕ WMSSM Course 7: Credit and Lending
- ⊕ WMSSM Course 8: Insurance Products in Wealth Management
- ⊕ WMSSM Course 9: Education Funding
- ⊕ WMSSM Course 10: Business Ownership and Planning
- ⊕ WMSSM Course 11: Retirement Planning Considerations
- ⊕ WMSSM Course 12: Equity Compensation
- ⊕ WMSSM Course 13: Estate Planning

WMSSM FAQ

- ⊕ Who should enroll in the WMSSM Certificate Program?
- ⊕ How many questions are on the WMSSM final exam?
- ⊕ What is the passing score for the WMSSM exam?
- ⊕ What is the renewal requirement for WMSSM Certificate?

Is this designation right for you?



Offer the WMSSM Program to Your Employees

Kaplan offers enterprise business solutions to keep your most valuable resources working smarter.

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ADVANCED DESIGNATIONS

[CFA® - Chartered Financial Analyst®](#)

[CAIA® - Chartered Alternative Investment Analyst](#)

[FRM® - Financial Risk Manager](#)

WEALTH MANAGEMENT

[CFP® Certification](#)

[Professional Designations](#)

PROFESSIONAL CERTIFICATES

[CFA Institute Investment Foundations™](#)

[JIA - Junior Investment Analyst](#)

MASTERS PROGRAM

[Personal Financial Planning](#)

WHOLESALE REAL ESTATE

Dearborn Real Estate Education

CONTINUING EDUCATION

Insurance Continuing Education

Accounting Continuing Education

Real Estate Continuing Education

PROFESSIONAL DEVELOPMENT

Insurance PD

Fraternal

ARCHITECTURE & ENGINEERING

Architecture

Engineering

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