



Wealth Management

WMSSM



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

Wealth Management SpecialistSM - WMSSM



WMSSM Professional Designation Program

The Wealth Management SpecialistSM 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.

Advance your career for only \$599. Call to enroll.

The program is ideal for:

- New hires not yet ready for a more rigorous designation program
- Experienced producers who are transitioning from product sales into offering a broader range of products and services
- High-level platform personnel
- Sales assistants and support staff
- Professionals who want to advance their career online on their own schedule

Upon graduation, WMSSM designees receive credit for the completion of FP511 in our CFP® certification education program.

Review our [Policies and Procedures](#) for more details.

Call Our Designation Specialists to

Enroll

800-237-9990 option 3

Frequently Asked Questions about the WMSSM Designation

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?

[Why Pursue the WMSSM >](#)

How does the WMSSM Program work?

[WMSSM Program Details >](#)

Offer the WMSSM Program to Your Employees

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

[Kaplan for Business >](#)



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[Privacy Policy](#)

[Policies & Procedures](#)

[ADA Policy](#)



LICENSING

Insurance Licensing
Securities Licensing
Real Estate Licensing

WEALTH MANAGEMENT

CFP® Certification
Professional Designations

MASTERS PROGRAM

Personal Financial Planning

CONTINUING EDUCATION

Insurance Continuing Education
Accounting Continuing Education
Real Estate Continuing Education

ADVANCED DESIGNATIONS

CFA® - Chartered Financial Analyst®
CAIA® - Chartered Alternative Investment Analyst
FRM® - Financial Risk Manager

PROFESSIONAL CERTIFICATES

CFA Institute Investment Foundations™
JIA - Junior Investment Analyst

WHOLESALE REAL ESTATE

Dearborn Real Estate Education

IT TRAINING

IT & Cyber Training

KAPLAN COMPANIES

PROFESSIONAL DEVELOPMENT

Insurance PD

Fraternal

Kaplan, Inc.

Kaplan Test Prep

Kaplan Financial UK

Kaplan Solutions

ARCHITECTURE & ENGINEERING

Architecture

Engineering

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