



SYLLABUS: CERTIFIED CAPITAL RAISING SPECIALIST

Program Director: Richard C. Wilson | **Time:** Self-Paced Program

Location: 100% Online | **Email:** Clients@FamilyOffices.com

Get certified through the most practical capital-raising program, built on 18 years of running our investor club and 1,500 investor insights from 300 live events

LEARNING PLATFORM INCLUDES:

- 50 Video Modules & 10 Expert Audio Interviews (Streamed via the FOC Portal and Mobile App)
- Every program includes 2 years of virtual access to 30 investor club events, and 30+ AI tools, and every program features \$1B+ investment firms founders, family offices, investors, etc. as instructors, not tenured professors stressing economic theories or memorization of terms.

LEARNING OBJECTIVES OF THE CCRS:

1. Gain a detailed perspective on what various types of investors expect and want when seeking investments, including the difference between HNW private investors, family offices, and institutional investors.
2. Explore the topics of copywriting, investor avatars, re-marketing, social media, investor funnels, single family offices, master DDQs, and placements agents so you can more swiftly navigate various capital raising tools and methods.
3. Become familiar with the 5-Step system for raising capital as an option to attract investors to the organization you represent vs. calling out or networking to identify and close new investors.
4. Learn essential investment marketing and sales actions that must be taken to properly follow up with investors, many of which are specific to capital raising
5. Familiarize yourself with the fundamentals of capital raising to shine a light on industry myths and common expensive mistakes that almost everyone makes while starting out.

PROGRAM REQUIREMENTS:

Self-Management: The Certified Capital Raising Specialist (CCRS) is a self-study certification program. We greatly want to see you succeed, but your success depends on and directly corresponds to the amount of time and effort you put into learning the material, read the required readings and ask questions as they arise.

MASTER'S CERTIFICATE PROGRAMS: Become certified in one, two or complete any four to earn your Master's Certificate in Investments. To learn more about these Certification Programs and how to earn one, please see our website: <http://FamilyOffices.com/Certifications>