



### **Syllabus: Qualified Family Office Professional (QFOP)**

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

**Location:** 100% Online | **Email:** [Clients@FamilyOffices.com](mailto:Clients@FamilyOffices.com)

**Family offices manage \$14 trillion, more than private equity and venture capital combined – and we offer the #1 certification program on investment strategies, deal origination, transaction structures, deal negotiation, due diligence best practices, JV & Co-GP trends, and industry best practices.**

#### **LEARNING PLATFORM INCLUDES:**

- 60 Video Modules & 37 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 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 relevant areas of family office wealth management including: 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:**

***Self-Management:*** The Qualified Family Office Professional (QFOP) 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>



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

[The Single Family Office by: Richard C. Wilson](#)

[ISBN:9781503345034](#)

\*\*PDF Available for free upon Registration.