American Academy of Financial Management ®

International Board of Standards ©

AAFM ® Global Certification
Standards and Accreditation Council



Our AAFM® Board Certification

- We are the fastest growing Graduate professional certifying board and standards council in the world:
 - Members in 151 countries
 - Approximately 10,000 fellows, charter-holders, candidates, and members holding professional designations worldwide growing by 10-15% a year, and 45,000 affiliates and associate members in over 150 countries.
 - In 2010-11 we project 5,000 new members in Asia, India, EU, Australia, Latin America, Africa, and China.
 - Certification Programs for:
 - Major Organizations: AACSB, ACBSP, ABA Schools, Corporates: AABFS, ,IIFM, IBA, and major corporate and governmental agencies worldwide.
 - As Seen in FINRA, INVESTOPEDIA, Wall Street Journal, Forbes, CNN,
 MarketWatch, The Hindu National, El Norte Mexico, Financial Times, Knight
 Ridder/Tribune Business News, AP Associated Press, Black Enterprise, The China
 Daily, CNN, AACSB News, Peninsula On-line, The Gulf Times, Nassau Guardian,
 ACBSP News, Asia Africa Intelligence Wire, The Arab Times, Empresa Exterior,
 Spain, Arab News, The Business Wire, Congress News, The Congressional
 Quarterly, The Economic Times, Antara, Al-Bawaba News, and the South China
 Post.





The AAFM ® Board of Standards or Related Education has been recognized listed, disclosed, recognized or in alliances with the following institutions, governmental organizations or agencies.

US Dept of Labor Registry, Websites, and brochures - US Government Occupational Handbook

The US Department of Education Registry EROD

AACSB Accreditation Prof. Member and Articulation Recognition

ACBSP Accreditation Prof. Member Articulation Recognition

United Nations Civil Society Registry

Indian Academy of Financial Management

Arab Academy of Finance Banking Sciences - Diplomatic Cross Recognition

Conferencia Internacional de Finanzas – Latin America

China Banking Association and SETC Government Agency, Asian Bankers Institute

Monetary Authority of Singapore Training Courses Approvals

Bahamas West Indies Government University System

UAE Financial Markets and Stock Markets & Dubai - UAE Quality Group

Royal Society of Fellows, The European EU - Quality Framework Institute via training partners.

The Online LLM Graduate Law School Program

India Management Academy, India Business Academy, Australian College of Financial Planning

Accreditation Council for Business Schools and Programs

ISBE, NBEA, ANSI, NOCA, AABFS, IIFM, AACSB, ACBSP, and EIMA

Arab Academy and Egyptian Finance Association

Published in The Occupational Outlook Handbook - United States Government Department of Labor

Association of Certified Chartered Economists ACCE Africa and USA

The US regulatory Registry of NASD/FINRA (Disclosed and Publicly Listed for over 5 years)

ANSI American National Standards Institute - Member

NOCA National Organization for Competency Assurance - Member

National Business Education Association, International Society Business Education

CFA/Institute - Exhibit 18 CFA/Vision 2012 and PDU

CFP/Board – Listed for CFP/Continuing Education by FSSB for AAFM Wealth Management CWM Programs and many more.

AAFM [®] Regular contributors to finance/business columns







CWM ® Chartered Wealth Manager - AAFM ® Certified ® Wealth Management Program

The AAFM ® Board of Standards USA is the creator and founder of the first graduate Wealth Management Charter Certification Program in the world and the CWM ® is the first vendor neutral wealth management designation to be listed by the NASD/FINRA reference guide.

The AAFM ® CWM ® program has been featured in the Wall Street Journal and also the CWM ® curriculum has been recognized and used in an ABA accredited law school degree program.



Emerging Markets - 150+ Countries & Truly Global Since 1999...







Mainland - China

Africa

AAFM [®] Board of Standards Recognizing Top Executive Programs Globally



Authorized Public Programs

- Executive Programs offered in over 30 countries, in multiple languages
- 27 Specialist Designation award programs
- Typical Programs are approximately 30-40 hours in duration
- Average class sizes around 20+
- On average 5-7 programs per week are running somewhere in the globe
- AAFM works through strategic marketing partners in each country



American Academy ® - Represented Brands and Alliances































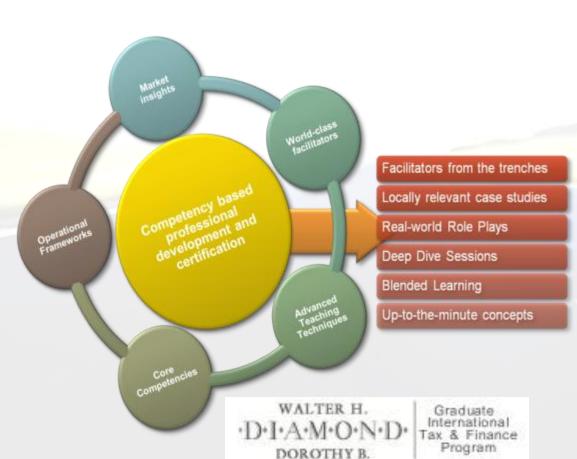


Tailored In-House Certification Alliances and Programs Globally





In-house custom training and Accredited Law School Programs



Custom In-House Training

- AAFM provides graduate executive training for leading brands and companies
- A few countries where in-house training has been conducted:
 - Hong Kong, Taiwan, China
 - Malaysia, Singapore
 - Australia, Papua New Guinea
 - UAE, Kuwait, KSA, Bahrain
 - Pakistan, India
 - USA, Bahamas, Mexico
 - India, Mumbai Chennai
 - USA, Canada...
 - Peru, Bolivia, Mexico, Chile Argentina
 - UK and London



AAFM® Board of Standards & Advisors

Global Board of Standards – A Sample of our Members, Advisors and Award Winners.



Professor Dr. Roberto J. Santillán Salgado Director of the Master in Finance Program at EGADE-ITESM, Monterrey Campus Prof. George S Mentz, JD, MBA, CWM® – AAFM CEO USA – Board of Standards – Lic. Counselor of Law and Notary Public Dr. Ciro Martinez, Esq. – Academic Standards and Law School Alliance Chair Carl Thong, MBA, CWM ®, MFP – AAFM Asia (President of Asia Standards and Accreditation)

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Board, Advisory and Recent Faculty Award Winners: Full List: http://financialanalyst.org/board.html

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Prof. Dr. C. P Wolff, MFP - Maastricht University - The Netherlands Centre for Economic Policy Research, London

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James Lavorgna, JD, CWMTM, CFPTM, LLM – USA – Royal Society of Fellows President

Dr. Nicola A. Spence, PhD, CPM - San Francisco, Japan, Asia

Hon. Dir. Andrew Kane, OBE, CWM, CRA – Former CEO and Managing Director HSBC Private Banking - Wealth Management, California - AAFM Master Financial Planner, Certified Wealth Manager

Prof. (Dr.) Niranjan C. Bhat, Hon. Global Advisor for AAFM and AAPM, International & Grand PhD, FAAPM / FAAFM, MPM / MQM / MMC, CIPM, GPM, CPD and MFP - India. Advisor to the President

AAFM® Approves Various Executive Training Centers and Graduate Programs













The AAFM Sponsors Conferences around the world. - News: The AAFM were global sponsors of the IX IFC International Finance Conferences in Buenos Aires, Argentina and the Global Wealth Conference in Shanghai, China Conferencia Internacional De Finanzas. The 2010 conferences are in Shanghai and Monterey MX.

To your right, the AAFM ® has sponsored global programs in the Arab States also.

The AAFM ® has diplomatic
Alliances with the Arab
League Owned Arab
Academy of Banking and
Finance which provides
recognition in 22 Arab
Nations along with India
Recognition from the India
Institute of Finance





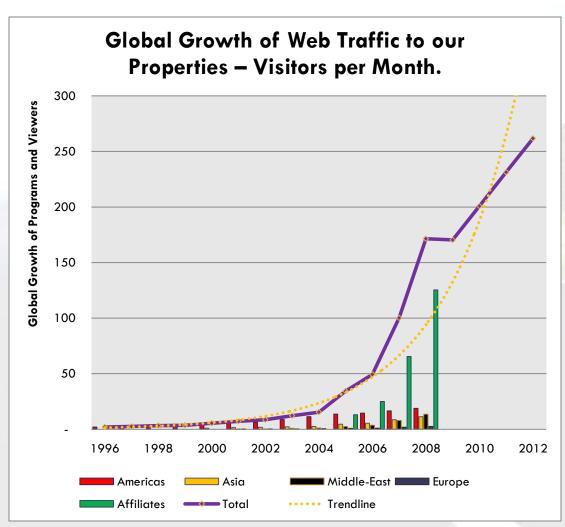




AAFM [®] Accredited Member Global Growth

Global growth --

AAFM ® is the fastest growing Graduate Professional Board of Standards and Accreditation council for business certification in the world with visitors around the global to our websites and informational resources...





AAFM ®Amazing Global Standards and Expansion New Standards Boards for over 30 countries.









News: The AAFM ® Board USA works again this year with US Government to provide opinion and insights on financial innovation, reform, and employment analysis. The AAFM ® Board - Academic Standards and Quality Commission to lead this AAFM® Task Force.

News: AAFM ® and AAPM Working directly with Chinese Government Agencies for Certification **Quality Standards & Training. Asia Certification Standards Board Formed**

News: AAFM ® and AAPM Approved in 22 Arab Countries. AABFS Diplomatic Agreement Signed. Certification Board Formed with AAFM Board Members.

News: AAFM ® and AAPM Board and Certifications Approved by India Academy and Presidential Advisors Offices. India Wide Approval with India Standards Board

News: AAFM ® and AAPM approved in Multiple Latin American Countries.

News AAFM® Approved for Alliance with Egypt Association with Capital Markets Authority Approval.

Approved: AAFM Law School Certification Programs Approved. ABA Accredited Education Available Worldwide.

News: Prof. Mentz named Chairman of Educational Standards for the International Board of **Qualified Financial Planners**

AAFM Board and members from 41 Nations of Latin America and The West Indies join together to create AAFM-LA Certification Standards Council.

AAFM ® International Board of Standards is first to be a recognized professional member of the: NBEA, ISBE, AACSB, ACBSP, RSOF, ANSI, AABFS, IIFM, CWMC, and NOCA.

Truly Global ... AAFM® requiring accredited education for over a Decade...

AAFM [®] American Academy Worldwide Recognition



As seen in Forbes, Reuters, Investopedia, The Wall Street Globe™, The El Norte ™ Mexico, The China Daily ™, The Arab Times ™, The Hindu National ™, Black Enterprise ™, Gulf Times ™, The Financial Times, The Associated Press AP ™, Black Enterprise, US Trademark Office, United Nations UNESCO and much much more.

The AAFM ® is at the Forefront of Standards and Quality by focusing on accredited and government recognized education worldwide. The AAFM ® is the first in the world to integrate double accredited business schools as partners in education.

AAFM ® and its graduate requirements, and its credentials are now featured in the Investopedia Dictionary and The Wall Street Journal.



AAFM® World-class certification working with Local and Regional Institutions





AAFM® Official Diplomatic Governmental, & NGO/SRO Recognitions and Board Alliances

- Recognized in the Civil Society Registry of the United Nations and United States
 Dept of Education, and US Department of Labor websites
- Compliance Friendly & Disclosed/Listed in the FINRA/NASD Investor Education Registry for over 5+ years.
- AAFM ® is officially disclosed, registered and recognized with US
 Governmental Authorities and holds the same US legal designatory powers and
 award granting status as the CFP, CFA Institute, Non-Royal Charters and other
 global professional Boards
- AAFM ® is a registered Disclosed Society with the United Nations
- The AAFM ® Constitution and By-Laws are regulated by a Board of Standards including 40 Doctorate level professionals, deans, professors, and executives from 20 countries which adhere to the principles of credential usage regulation discussed by The US Supreme Court. Ibanez/Peel
- Recognized Certification in India, 22 Arab States and China
- Trademark Agreement with CFA Institute AAFM ® Certifications and Brand observed in Legal Contract.
- Trademark Agreement with the CFP Board AAFM ® Brand and Certifications
 legally Observed

AAFM ® Recognition & Articulation

- AAFM® is recognized and/or registered with an alliance or articulation with the following countries and jurisdictions:
 - **United States** Listed and Disclosed Department of Labor, Dept of Education, NASD FINRA for 5+ years,, AACSB Member, ACBSP, AABFS, IIFM, GBR China, plus legal Trademark Co-Exist Agreements with both CFA and CFP, etc while no direct affiliation is needed.
 - **China, PRC** Department of Labor, Ministry of Human Resources, State Economic and Trade Commission, National Training Centre for Economic Cadres, Central University of Finance and Economics, BOC, Peoples Bank of China, etc
 - **European Union** AAFM/AAPM Disclosed to Spain and UK authorities and to Greek Ministry of Finance, Insurance Association, European Quality Framework Organization, etc
 - **Singapore** Curriculums disclosed to Monetary Authority of Singapore, used at local government registered programs under supervision of Ministry of Education, etc
 - Hong Kong Disclosed: HK Government, IFPA, etc.
 - Arab Academy League of Arab States Full Alliance and UAE Dubai Municipality, Dubai Financial Market, DIFX Academy Bahrain Bahrain Institute of Banking & Finance, Bahrain Training Institute, Bahrain Monetary Authority Qatar Disclosed Qatar Financial Centre Kingdom of Saudi Arabia MFTC disclosed to Capital Markets Authority, Ministry of Finance, etc
 - **Mexico & Latin America** Recognized via legal articulation by accredited government recognized programs in Bolivia, Chile, Mexico, Argentina, and Venezuela and with top universities and business schools with various chapters and major conferences.
 - **USA** AAFM is the first to have an accredited law school program articulation alliance.
 - **Bahamas West Indies** Direct License to the Government College of the Bahamas. AAFM Programs offered from the College of the Bahamas.

AAFM ® University Partnerships & Alliances

- As of September, 2004 The **AACSB**TM and **ACBSP**TM (comprising the top 800 business schools & programs in the world) are now recognized and registered educational programs that qualify for educational credit for AAFMTM Membership, Certification, and Financial Designations
- AAFM ® is in articulation alliance with the Diamond LLM Program of The Thomas Jefferson School of Law TJSL. Graduates of the TJSL programs can apply to AAFM for certification without further exam. The TJSL holds recognition from the American Law Society and the American Bar Association in the United States. TJSL also provides AAFM and AAPM designations for participants in their degree and post-grad programs.
- AAFM ® has held a mutual recognition alliance with the Swiss Banking School on our Wealth Management Programs.
- AAFM has had advisors for membership that includes top finance professors from colleges around the world such as Stanford, NYU, AGSM, University of London, Universite de Bourgogne Dijon Cedex, Thunderbird Graduate School, Stockholm School of Economics, EGADE, BU and others
- AAFM ® is the first in the world to have joint recognition and sit on the advisory boards of the Arab Academy, the India Academy, The African Academy, the China Council and the Latin American Academy.



AAFM ® Alliances with Professional Organizations

- AAFM ® is also aligned with other professional associations and global training organizations, such as:
 - AAFM ® Certification is available in 34 Latin American Countries in Spanish www.aafmla.org via articulation with ITESM and EGADE
 - AAFM has an Exclusive Alliance with the Royal Society of Fellows, RSOF
 - AAFM has alliance programs in 17 Arab States for 22 Arab Nations <u>www.aabfs.org</u>
 - AAFM has joint programs in key cities in India. www.aafmindia.com
 - AAFM has been extremely successful in Asia and Middle East with Executive Certification programs in both regions.
 - AAFM ® has held a China-wide relationship with the **British Standards Institute** where we jointly deliver Risk Management programs across 34 separate training centers in the PRC www.aafmasia.com
 - AAFM ® has held an Asian collaboration agreement with The Asian Banker organization and we cooperate on major events such as the Asian Wealth Management Forum/Academy and others
 - AAFM ® has virtual networks and career tools with **LinkedIn**, **JobsintheMoney**, **DICE.com**, **Job Target** and more
 - Brazil www.AAFMBrazil.com www.AAFMAFrica.com



Accreditation Commission — AAFM ® Board

AAFM [®] is a Standards Council and Certifying Body that requires:

- 1. Government Recognized Education and Exams
- 2. Relevant Professional Experience
- 3. Accredited Degree Credentials such as ACBSP Double Accreditation
- 4. Graduate Assessment or Testing
- 5. Abide by Global Ethics and Professionalism Standards
- 6. Engage Continuing Education
- Students today are beginning accredited programs with professional certification in mind. Finish an accredited program that is registered and approved by AAFM and immediately apply for certification.
- AAFM® Advisory Standards Boards established in Asia, China, India, Middle East, Latin America, and EU



AAFM® Charter and Certification — Post Nominals vs. a Training Certificate

- State Regulated or Gov. Lic. Profession such as CPA, MD, JD/Esq. These are most often a government regulated professions, with legal constraints in respect to use of the license, and a code of practice managed by senior industry peers (e.g. American Bar Association, American Medical Association, CPA/AICPA)
- Quasi Governmental & SRO Self-Regulatory Professional Designations such as AAFM® Board Certifications, Board Qualifications, CWM®, CRA™, CFA™, CFP™, RFS™, MPM™ etc are Board of Standards issued Designations in finance and management, protected under trademark and trade secret law and member charter, but are independent self-regulatory bodies. Post-Nominals ('letters following your name') can only be used for such professional trademarks, or academic awards from a vendor-neutral and Independent Board of Standards. Protected use by Bar Associations.
- Other Proprietary inter-company or Training Programs and certificates. These generally offer only 'statements of completion' or vendor-related certificates of attendance, but can not issue a post-nominal portable designation which is the defining mark of a professional credential or postgraduate mark/sanction.



Benefits from AAFM ® Certification



 Use of Board Certified Designations/Trademark after your name on your Business Card and on your Promotional Materials as long as you continue in Good Standing as a AAFM ® member

Prof. Dr. A. M. Smith, CWM ® (Fellow AAFM ®)

- Most AAFM ® certification courses also count toward Continuing Professional Education for many professions and also may count for CPA Requirements, Law Attorney License Requirements, and for Continuing Education.
- Improve Public Relations or the image of staff as 'professionals'
- Staff opportunities to network with charter holders and members in GCC Countries and throughout the world
- Hi tech job tools and career packs
- Recognized post-nominal leading to academic credits
- Recognition by alliance partners, corporate sponsors and multiple government bodies



Online and Onsite Program Structure

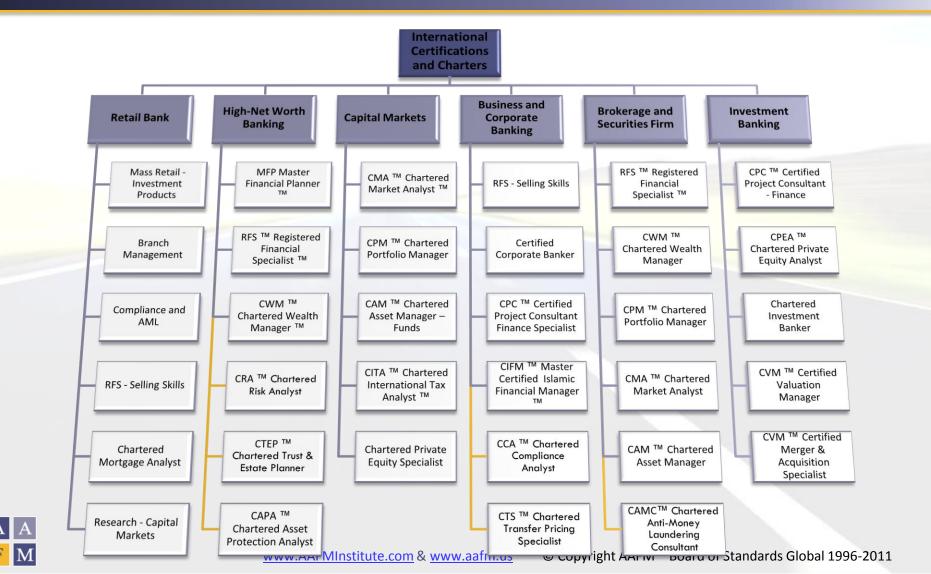
Certified Programs

The AAFM ® Offers Board Certification to Graduates of Qualified Programs Globally. AAFM works with the TJSL Diamond accredited law school USA programs to delivery top standards in key professional areas:

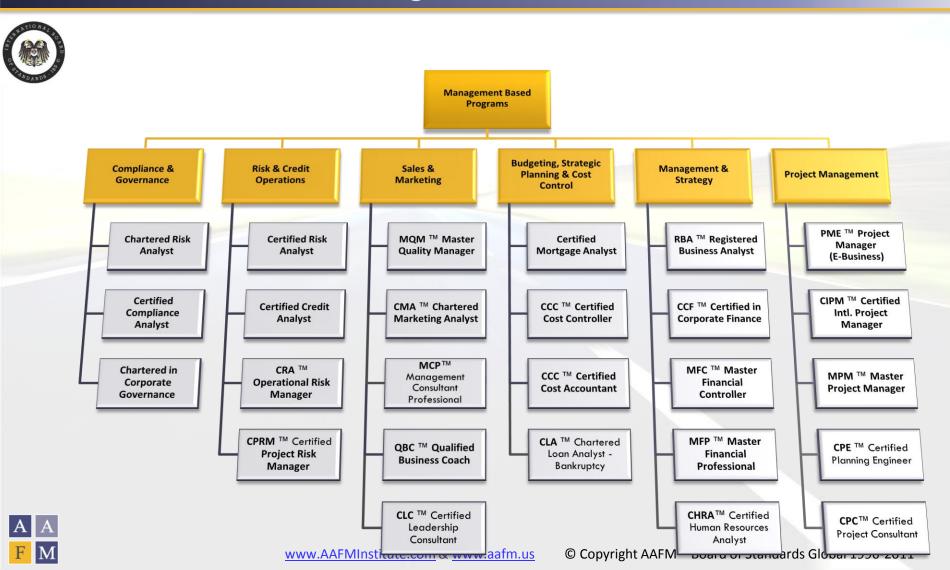
- •International Tax
- •Wealth Management
- •Investment Management
- •Compliance, AML, Financial Crimes
- •Financial Asset Management and Portfolio Management
- •Trust and Estate Planning International



Finance Sectors – Certifications and Charter Designation Specializations.



Management, Risk, and Compliance Certification Programs

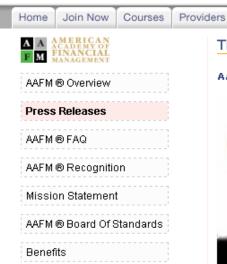


Member Tools, Job Tools, Journal, Articles, Stocks Markets and more

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Requirements

The AAFM ® American Academy of Financial Management ®

AAFM ® Global Board of Standards ™- Official Certifying Body ™

Certification



Locations

Speakers

Professor Mentz welcomes you to our Global Board of Standards Website. Please enjoy our global job tools, career advice, global standards information, articles, educational research, and market updates....

Publications

Articles

My AAFM

News - AAFM ® Signs Alliance with The India Academy, The China Board of Standards, and The AABFS Arab Academy of Banking and Financial Sciences, & The African Economist Association , See Yahoo News Press Release - AAFM @ and AABFS will be offering joint certification programs in over 50 countries, Prof. Mentz will chair the new Certification Standards Board that was chartered under the alliances in Arabia, India, Latin America, Singapore and China.



More Global AAFM ® News

- News: The AAFM ® Board USA works again this year with US Government to provide opinion and insights on financial innovation, reform, and employment analysis. The AAFM ® Board - Academic Standards and Quality Commission to lead this AAFM® Task
- News: AAFM ® and AAPM Working directly with Chinese Government Agencies for Certification Quality Standards and Training, New Certification Boards Being Formed

AAFM ® GLOBAL BOARD @

AAFM ® As Seen in Wall Street Journal, Forbes, CNN, MarketWatch, The Hindu National, El Norte Mexico, Financial Times, Knight Ridder/Tribune Business News, AP Associated Press. Black Enterprise, The China Daily, CNN, AACSB News, Peninsula On-line, The Gulf Times, Nassau Guardian, **ACBSP News, Asia Africa** Intelligence Wire, The Arab Times, Empresa Exterior, Spain, Arab News, The **Business Wire, Congress** News, The Congressional Quarterly, The Economic Times, Antara, Al-Bawaba News, and the South China Post.

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News, Hot Topics, and Articles



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E-Ban	E-Banking (3)										
E-Con	E-Commerce (3)		drich@laxneville.com > is a partner of the law firm of Lax & Neville, LLP in New York City. Mr. Rich litigates commercial, employment, and securities matters in federal and state courts, and arbitrates such matters before FINRA and other arbitral bodies.								
Finan	Financial Management (7)		and arbi	craces such file	accis belole	TINKA dila oti	ici arbitrar bour	uo.			
Gener	In Gold We Trust (February 2009) Economics by Michael Preiss										
Marke	Marketing (5)			On the back of the U.S. dollar it says: "In God We Trust".							
Marke	Markets (19)			For far-sighted and risk averse investors however, increasingly it is: "In Gold We Trust".							

What else we provide

- Job search and executive recruitment support
- http://aafm.efinancialcareers.com
- Reference letters for job applications
- Document search and research assistance for technical templates, forms, reports, etc
- Links to professional networks such as LinkedIn
- We are your Executive Career Coach tell us what you need and we will do our best to help.





AAFM ®American Academy – Exclusive USA Employment Verification System with Member Password Protected Technology and Career Tools





Global Networking Events



Recent events in Argentina, Switzerland Singapore, Athens, New York, Dubai & Latin America, and Hong Kong.

Major networking events in China, Latin America, India, Africa & USA







Government and Authoritative Book References to AAFM ®

- <u>Directory of Global Professional Accounting and Business Certifications Page 264</u> by <u>Lal Balkaran Business & Economics 2007</u>
- The RIA's Compliance Solution Book: Answers for the Critical Questions - Page 274 - Elayne Robertson Demby - Business & Economics
- <u>US government Occupational Outlook</u>
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- The Truth About Money 3rd Edition Page 596 Ric Edelman Business & Economics
- The Internet guide for finance Page 12 Roy A.
 Wiggins Business & Economics -
- <u>Changing Faces: America's Wealth Advisors -</u>
 <u>Page 240 James M. Robinson</u>
- <u>Pocket Guide to Essential Human Services Page</u>
 159 <u>Frederic G. Reamer</u>
- <u>Strategic Intellectual Capital **Management** in Multinational Organizations ...</u>
- Kevin O'Sullivan Business & Economics -

- The Human Resources Glossary: the complete
 desk reference for HR executives ... Page 23 –
 W. R. Tracey Economics
- US House of Representatives Congressional Testimony.
- 100 fastest-growing careers: your complete
 guidebook to major jobs with the ... Page 125 J. M. Farr Business & Economics -
- Green Careers: Choosing Work for a Sustainable
 Future Page 96 Jim Cassio, Alice Rush Business & Economics
- <u>Tax-aware investment management: the essential</u>
 <u>guide Page 36 Douglas S. Rogers Business & Economics</u>
- Get Rich, Stay Rich, Pass It on: The Wealth
 Accumulation Secrets of America's ... Page 172 Catherine S. McBreen, G. H. Walper
- America's 101 Fastest Growing Jobs: Detailed Information on Major Jobs with ... - Page 139
- Government of California Employment Department EDD.



AAPM® IPMC Alliance Globally Management Certifications

with the AAPM ® Global International Academy of Project Management ® ·

AAFM ® is in direct alliance AAPM® Management Certification Programs and Accreditations in conjunction with AAFM ® and the Board of Standards.

- MPM® Master Project Manager
- CIPM® Certified International Project Manager
- PME TM Project Manager E-Business
- CPRM TM Certified Project Risk Manager
- CHRA TM Certified Human Resources Analyst
 - MQM TM Master Quality Manager
 - CPE TM Certified Planning Engineer
 - CEC TM Certified E-Commerce Consultant.
 - MCP TM Management Consultant Professional
 - QLC Qualified Coach Certifications







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www.aafm.us

AAFM ® Board of Standards
The Certifying Body and
Accreditation Commission

Toward Market Standards

Accreditation Commission

Alliances with Degree Programs sand Corporate Training for Fortune 500

Our AAFM Approved Certification Training Partners have trained clients that include: Deutsche Bank, Citibank, Xerox, NASA, HSBC Bank, China Construction Bank, National Bank of Kuwait, The Government of Dubai, BAE Systems, United States Securities and Exchange Commission, The US NAVY,, Department of Energy, The Department of Interior, 3M Asia Pacific, Dow Chemical, Hewlett Packard Singapore, Indian Overseas Bank, Shangri La Hotels, and HUNDREDS MORE.

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