



## Association of Independent Wealth Managers (Singapore)

### The industry body for External Asset Managers and Multi-Family Offices in Singapore

Established in 2011, the Association of Independent Wealth Managers (Singapore) is the representative industry body for External Asset Managers (EAMs) and Multi-Family Offices (MFOs) in Singapore. Recognised by the Monetary Authority of Singapore (MAS), it is a diverse and consultative trade association that drives the development of Singapore's independent wealth management industry.

As the leading industry advocate for independent wealth managers, AIWM Singapore actively promotes dialogue and engagement between regulators and various stakeholders within the community.

AIWM Singapore is also committed to championing best industry practices, strengthening the visibility and reputation of independent wealth managers, fostering collaboration among industry peers, and empowering members through continuous education, training development and networking opportunities.

The Association has over 70 active member firms from EAMs, MFOs, banks and service providers in Singapore.

### ABOUT INDEPENDENT WEALTH MANAGERS

Independent Wealth Managers, also known as External Asset Managers or Independent Asset Managers, are non-bank wealth managers regulated by the MAS, and they range from independent management firms to family offices and individual advisers.

Concentrating on private investors and high net worth individuals, independent wealth managers offer a flexible, holistic and strategic approach to wealth management. With a focus on client centricity, independent wealth managers provide bespoke investment advice and solutions that are tailor-made to clients' individual needs in this fast-changing market environment.

As the number of independent wealth managers continues to grow in Singapore and across Asia, they are increasingly recognised as valued players in Singapore's financial ecosystem.



**AIWM fosters more collaboration in the industry. It is a great place to develop new relationships.**

*- AIWM associate member*

### MISSION & OBJECTIVES

As the voice of the industry, AIWM Singapore's mission is to:

1 Represent the distinct interests of our members to help various stakeholders better understand the role of independent wealth managers

2 Strengthen the visibility and uphold the reputation of independent wealth managers in Singapore

3 Drive dialogue and collaboration with regulators to shape policy initiatives, communicate new market practices and navigate regulatory changes

4 Foster a collaborative community of like-minded professionals that can benefit from one another

5 Empower members through continuous education and training development to elevate industry standards

## CORE VALUES

COMMITMENT • EXCELLENCE • PROFESSIONALISM • INTEGRITY

## AIWM SINGAPORE COMMITTEE

LUCIE HULME  
President

JOLENE TAN  
Vice-President

DAVID DOERIG  
Treasurer

ALEXANDER FLOERSHEIM  
Secretary

EDWIN LEE  
Education

CHIARA BARTOLETTI  
Regulatory & Advocacy

“

AIWM is the place to pull together resources - networking, compliance, education and cost synergies.

~ AIWM ordinary member

**JOIN US** AIWM Singapore strives to champion best industry practices, professionalism, and integrity of independent wealth managers in Singapore. Supported by active members, AIWM equips industry practitioners with business support and resources, training development and networking opportunities to operate competently and thrive in today's fast changing wealth management landscape.

## BENEFITS

1 Industry networking sessions and events to exchange ideas and cultivate new relationships among professionals

2 Access to dedicated compliance support centre and extensive suite of business support tools, templates and resources

3 Growing network of active EAMs and quality service providers in Singapore

4 Regular insights on new market practices, industry developments and regulatory guidelines

5 Cost synergies through exclusive updates and offers

### ORDINARY MEMBERSHIP *SGD 2,000 per annum*

The Ordinary Membership is available to companies where the provision of Independent Wealth Management is the core business activity.\* AIWM only accepts active members who have sufficient qualifications in the field, a good reputation and have extensive expertise and capability in delivering world-class wealth management services to clients who qualify as an Accredited Investor.

*\*50% of the business is in private wealth management for high net worth individuals*

### ASSOCIATE MEMBERSHIP *SGD 5,000 per annum*

The Associate Membership is open to companies that may not meet the criteria for active ordinary membership but share the vision, values and ethics of independent wealth managers. These businesses complement or support ordinary members. The Associate Membership is suitable for companies interested in the profession and work of independent wealth managers.

To apply, contact [secretary@aiwm.sg](mailto:secretary@aiwm.sg)

CONTACT US [www.aiwm.org.sg](http://www.aiwm.org.sg)