

Title:

Certified Shari'ah Wealth Planner
**From Concept to Credential: Positioning the CSWP as a Recognized Professional
Designation in Global Islamic Finance**
Investment Banking • Investment Advisory • Wealth Management • Treasury
Unifying Scholars, Regulators, and Practitioners

Outline:

CSWP Program Presentation Outline for NACIF Conference

Conference: North American Conference on Islamic Finance (NACIF)

Location: Chicago, Illinois

Date: October 2026

Presentation Duration: 45 minutes + 15 minutes Q&A

Presentation Title

Certified Shari'ah Wealth Planner: From Concept to Credential

Positioning the CSWP as a Recognized Professional Designation in Global Islamic Finance

Subtitle: Investment Banking - Investment Advisory - Wealth Management - Treasury

Presenter Information

Brother Hakeem J. Webb, MSFS, CTP, CIBE, CSWP

CEO & CIO at: NCFA, Inc.

615.497.2698

Hakeem J. Webb, MSFS, CTP, CIBE, CSWP

A Visionary Guided by Abrahamic Ethics: Hakeem J. Webb and the Rise of Ethico-Economics™

Hakeem J. Webb is a trailblazing entrepreneur and financial innovator whose journey has been shaped by an unwavering commitment to the ethical principles of the three Abrahamic faiths – Judaism, Christianity, and Islam. As the founder and CEO of NCFA, Inc., Webb leads a nationally recognized, minority-owned and operated independent registered full-service fee-only investment advisory firm redefining the global finance paradigm. (Visit www.ncfainc.org for a full biography and career highlights.)

Presentation Abstract

This session introduces the Certified Shari'ah Wealth Planner (CSWP), a groundbreaking professional certification that addresses the critical gap in Islamic wealth management credentials. Designed to rival the Certified Financial Planner (CFP) and Certified Treasury Professional (CTP) designations while maintaining 100% Shari'ah compliance, the CSWP represents the first comprehensive Islamic wealth planning certification aligned with AAOIFI standards and positioned for FINRA recognition. This presentation will unite scholars, regulators, practitioners, and educators to explore partnership opportunities in establishing the global standard for Islamic financial advisory professionals.

Learning Objectives

Attendees will:

1. Understand the \$3+ trillion Islamic finance market opportunity and the credential gap
 2. Examine the comprehensive 35-credit hour, 12-module CSWP curriculum benchmarked against CFP, CTP, and AAOIFI standards
 3. Evaluate the FINRA recognition pathway and regulatory framework
 4. Explore partnership opportunities for institutions, employers, and regulatory bodies
 5. Assess implementation strategies and quality assurance measures
-

Presentation Outline

I. Introduction and Market Context (8 minutes)

- **Global Islamic Finance Opportunity**
 - \$3 trillion in assets, growing 10-15% annually
 - 1.8+ billion Muslims seeking Shari'ah-compliant services
 - Critical shortage of qualified Islamic wealth planners
- **The Credential Gap**
 - CFP lacks Islamic finance components
 - Existing Islamic certifications focus on banking, not comprehensive planning
 - No globally recognized Islamic wealth-planning credential
- **The CSWP Solution**
 - First comprehensive Islamic wealth planning certification

- CFP-level rigor with full Shari'ah compliance
- AAOIFI-aligned standards and FINRA recognition pathway

II. Program Architecture and Curriculum Excellence (12 minutes)

- **Program Specifications**

- 35 credit hours across 12 modules
- 12-month completion timeline
- 525 instructional hours + 705 self-study hours
- 200-question certification examination

- **Curriculum Structure**

- **Foundation Modules (1-2):** Islamic financial planning fundamentals, financial analysis
- **Core Planning Modules (3-7):** Risk management/Takaful, investment planning, tax/Zakat, retirement, estate planning
- **Advanced Modules (8-11):** Banking/Treasury, FinTech, Advanced Planning, Advisory Practice
- **Capstone Module (12):** Comprehensive integration and examination preparation

- **Benchmarking Against Industry Leaders**

- CFP: Comprehensive Financial Planning framework
- CTP: Treasury management best practices
- AAOIFI CIPA: Shari'ah governance standards
- MSFS: Graduate-level depth and rigor

- **Unique Value Proposition**

- Only certification combining CFP-level planning with 100% Islamic focus
- Modern FinTech and digital innovation integration
- Dual regulatory compliance (secular and Islamic)

III. Regulatory Framework and FINRA Readiness (8 minutes)

- **AAOIFI Standards Alignment**
 - Curriculum designed around the AAOIFI governance framework
 - Shariah compliance integrated throughout all modules
 - Financial accounting standards (FAS) incorporated
- **FINRA Recognition Pathway**
 - Professional designation standards compliance
 - Rigorous examination and experience requirements
 - Continuing education mandate (30 hours per 2 years)
 - Code of ethics and fiduciary standards
- **Admission and Assessment Standards**
 - Bachelor's degree with a 3.0 GPA or equivalent experience
 - 3,000-4,000 hours of professional experience required
 - Comprehensive assessment framework (exams 40%, projects 35%, case studies 15%, presentations 10%)
 - Background check and ethical standards verification

IV. Implementation and Partnership Model (10 minutes)

- **Faculty and Infrastructure**
 - 8-12 qualified instructors with dual expertise (we will roll it out with 2 or 3 instructors)
 - Integrated technology platforms (LMS, videoconferencing, digital library)
 - Professional certifications required (CFP, CFA, CTP, CIPA, or equivalent)
- **Program Investment**
 - Target cost: \$6,000-\$6,500
 - Competitive positioning vs. CFP and CTP
 - Flexible payment options and scholarship opportunities

- **Target Markets**
 - Financial advisors serving Muslim clients
 - Islamic finance professionals expanding credentials
 - Conventional planners entering Islamic finance
 - Global reach: Southeast Asia, MENA, North America, Europe
- **Partnership Opportunities**
 - **Universities:** Academic program integration (Guidance College Co-developer of program)
 - **Islamic Financial Institutions:** Employee development programs
 - **Professional Associations:** Member credentialing programs
 - **Regulatory Bodies:** Standards recognition and endorsement
- **Implementation Timeline**
 - Months 1-3: Faculty recruitment and content finalization
 - Months 4-6: Technology infrastructure setup
 - Months 7-9: Pilot program launch
 - Months 10-12: Full program scaling

V. Quality Assurance and Success Framework (5 minutes)

- **Quality Assurance Measures**
 - Industry advisory committee
 - Regular faculty performance reviews
 - External academic review every three years
 - Continuous curriculum updates
- **Program Success Metrics**
 - Course completion rate: 85%+ target
 - Examination pass rate: 75%+ target
 - Employment rate within 6 months: 80%+ target
 - Graduate satisfaction: 90%+ target

VI. Stakeholder Benefits and Call to Action (7 minutes)

- **Benefits for Partner Institutions**
 - Enhanced reputation in Islamic finance education
 - Revenue generation through program delivery
 - Workforce development contribution
- **Benefits for Employers**
 - Qualified professionals for a growing Muslim client base
 - Standardized competency assessment
 - Competitive differentiation
- **Benefits for Regulators**
 - Standardized competency framework
 - Enhanced consumer protection
 - Industry self-regulation through professional standards
- **Benefits for Financial Professionals**
 - Career advancement in a high-growth sector
 - Globally recognized credential
 - Expanded client base and service offerings
- **Call to Action**
 - Partner as an educational institution
 - Adopt CSWP for organizational professionals
 - Support regulatory recognition efforts

VII. Q&A Session (15 minutes)

- Open discussion with scholars, practitioners, regulators, and educators
 - Address specific implementation questions
 - Explore collaboration opportunities
-

Target Audience

- **Scholars and Shari’ah Advisors:** Islamic finance academics and jurists
 - **Regulators:** FINRA, SEC, AAOIFI, IFSB representatives
 - **Practitioners:** Financial advisors, wealth managers, investment professionals
 - **Educators:** University faculty and program directors
 - **Compliance Heads:** Islamic financial institutions' compliance officers
 - **Marketing Heads:** Financial services marketing professionals
 - **Students:** Graduate students in Islamic finance and financial planning
-

Key Takeaways

1. The CSWP fills a critical gap in Islamic finance professional credentials
 2. The program combines CFP-level rigor with complete Shari’ah compliance
 3. AAOIFI alignment and FINRA recognition pathway ensure global credibility
 4. Partnership opportunities exist for institutions, employers, and regulators
 5. The implementation timeline supports a full program launch in 2027
-

Session Format

- **Presentation:** 45 minutes with a professional slide deck
 - **Interactive Elements:** Live polling on partnership interest, Q&A engagement
 - **Materials Provided:** Program brochure, curriculum overview, partnership inquiry forms
 - **Follow-up:** One-on-one consultations available post-session
-

Technical Requirements

- Projector and screen for slide presentations
- Microphone for presenter
- Internet connection for potential live demonstrations
- Seating for 100-150 attendees
- Handout materials table

Contact Information for Inquiries

Brother Hakeem
hakeem.webb@ncfainc.org
615.497.2698
www.ncfainc.org

Submission Date: [Date]

Presenter Availability: [Specify any date constraints]