Comprehensive Wealth Education Curriculum & Platform

About Us

Tamarind Learning was named Best Specialist Service Firm (2022), and Tamarind Partners was named Best Family Office Management Consultancy (2019 and 2023) and Best Family Wealth Counseling (2019 and 2022) by The Family Wealth Report. These accolades support the growing interest for family wealth education, advisory and consulting.

We are thought leaders, innovators, educators, and practitioners. Founded by Kirby Rosplock, PhD, an entrepreneur born into a fourth-generation enterprising family, we understand the complex needs of our clients and serve as their trusted partner.

Tamarind Learning provides education solutions and online wealth education for beneficiaries, family office executives, and service providers.

For more information or to enroll contact:

Tamarind Learning
561-427-1330
info@tamarindlearning.com
www.tamarindlearning.com

View Course Info:

Schedule Education Assessment:

Overview

Tamarind Learning is a premier wealth education platform designed for affluent adult learners (18+). Tamarind's curriculum is geared towards individuals who need to understand the technical aspects of owning, inheriting, and stewarding wealth. Through our comprehensive courses, learners are equipped with the skills necessary to manage their wealth responsibly and effectively for generations to come.

Learn anywhere, anytime on an engaging and secure online platform with custom built tools and resources designed for wealth creators, beneficiaries and their advisors. Jump into coursework today and explore the latest research and insights from best-in-class resources and industry leaders.

Our Mission

At Tamarind Learning, our goal is to empower the next generation, combat entitlement, and provide learners with the knowledge they need to manage their wealth.

Who We Serve

Tamarind's education is particularly suited for individuals with assets in excess of $1 million, wealth in trusts, those who will inherit wealth, and advisors seeking to broaden their expertise beyond their area of practice.

Curriculum

Our flagship program, the Accredited Beneficiary Stewardship (ABS) program, consists of ten core technical courses. This program is designed to provide a comprehensive understanding of wealth management.

Learners who do not need support in all ten areas can select courses that meet their specific needs, creating a personalized learning experience.

ABS Courses

- Stewardship
- Beneficiary Fundamentals
- Trustee Basics
- Estate Planning Basics
- Trust Fundamentals
- Foundations of Tax
- Personal Finance Fundamentals
- Trust Administration Fundamentals
- Working with Advisors
- Investing Fundamentals

Optional Add-On Courses

- Family Office Fundamentals

Learning Experience

Our flexible coursework can be taken by individuals, families, or mixed groups such as next-gen cohorts. Learners can choose from the following learning experiences:

- **Self-Directed Learning:** Study at your own pace with our comprehensive online curriculum and tools.
- **Group Learning:** Leverage platform communication tools to spark discussion, share content, and keep the whole group engaged.
- **Partner with Your Advisor:** Work alongside your trusted advisor to integrate your learning into your wealth management strategy.
- **Certified Wealth Education Facilitators:** Engage with Tamarind Learning certified facilitators for guided instruction and support.

Special Offer

As an exclusive offer for UHNWI members, get 50% off your first course with the code **UHNWI2024** and schedule a complimentary education assessment with a Tamarind Learning expert to receive a custom learning plan.