

Program Overview

The Ivy League Pipeline into Private Banking

A coaching program for ambitious students breaking into private wealth management & private banking — on-demand curriculum plus 1:1 mentorship. Born at Columbia as the flagship training of the CUWMC; now open to students everywhere.

120+

Analysts trained

95%

Bulge-bracket placement

\$499+

Beginner pricing

Results from the Columbia Undergraduate Wealth Management Club, whose flagship curriculum became PWM Pathway (120+ analysts; 95% bulge-bracket placement among club analysts who applied for private banking roles, Spring 2026).

How PWM Pathway Works

Transparent from the first click: you always know what it costs, how long it takes, and what you get.

1

See if you qualify

A two-minute, four-question check — free, no commitment. You leave with a recommended tier plus instant access to the free intro course and the Top 10 Interview Questions guide.

2

Enroll — or apply for Full Access

Self-Paced and Flagship enroll instantly online: pay and everything unlocks in your library, including the Flagship Discovery Meeting you schedule yourself. Full Access is the one application tier (10 minutes, answered within 48 hours).

3

Your Discovery Meeting

Flagship & Full Access open with a 45-minute 1:1 strategy session: your background, your narrative, your target firms, and a concrete recruiting plan — booked on your own schedule.

4

Train & recruit 1:1

On-demand curriculum, a full resume rewrite, 1:1 mock interviews, an exact-template networking system, and off-cycle internship placement support — through to offers.

Private banking recruitment is unfair. Over 80% of private bank applicants are children of UHNW clients. With or without connections, we prepare you to secure six-figure offers at the leading Wall Street banks — the bar in the interview room is the same, and clearing it is what we train you to do.

Programs & Pricing

Every price is published — nothing saved for a sales call. Opening-discount pricing runs through October 1, 2026.

Self-Paced \$499 \$999 50% off · opening discount For disciplined self-starters. • Full module library — 5+ hours of fundamentals, industry landscape & the recruiting playbook • Downloadable templates — resume framework, networking scripts, question banks • Lifetime access, including all future updates • Private student & alumni community Enroll instantly online	MOST STUDENTS CHOOSE THIS Flagship \$799 \$1,499 47% off · opening discount Most students choose this. • Everything in Self-Paced, plus 1:1 coaching: • Discovery Meeting — a 45-minute 1:1 you schedule yourself • Resume teardown — full rewrite & PWM positioning • Two 1:1 mock interviews (behavioral + technical) • 2 coaching credits — 30-min 1:1s with any coach • Direct access to the instructor & alumni Enroll instantly online	Full Access \$1,999 \$2,499 20% off · opening discount Maximum acceleration. • Everything in Flagship, plus: • Biweekly 1:1 mentorship calls • Five mock interviews (incl. superday-style) • 4 coaching credits — 30-min 1:1s with any coach • Personalized firm-by-firm recruiting roadmap • Priority access — same-day response • Extended support through full-time recruiting Limited to 15 students per cycle By application
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Prices shown include the opening discount (through October 1, 2026). Self-Paced & Flagship enroll instantly at pwmpathway.com/pricing; Full Access is by application.

Coaching credits (Flagship 2, Full Access 4) each redeem for a 30-minute 1:1 with any coach on the roster — see pwmpathway.com/coaches. Senior coaches are 1 credit; junior coaches ½. Credit packs are available a la carte.

Compare programs

Feature	Self-Paced	Flagship	Full Access
Full curriculum library	✓	✓	✓
Lifetime module access	✓	✓	✓
Templates & frameworks	✓	✓	✓
Private community access	✓	✓	✓
Discovery meeting (1:1)	—	✓	✓
Resume teardown	—	✓	✓
1:1 mock interviews	—	2	5+
Coaching credits	—	2	4
1:1 mentorship calls	—	—	Biweekly
Recruiting roadmap	—	—	✓
Priority access	—	—	✓
Extended cycle support	—	—	✓
Enrollment	Instant	Instant	Apply

À la Carte Services

Not ready for a full program? Book a single service — or stock up on coaching credits. Listed lowest to highest.

Service	Price	Best for
Resume teardown & rewrite	\$39	Candidates not enrolled in the program.
1:1 strategy session (60 min)	\$79	Targeted advice on positioning or a specific firm.
Alumni office hours (monthly)	\$99/mo	Graduates who want ongoing access post-program.
Coaching credits — 3-pack	\$199	Three 30-min 1:1 sessions. Redeem with any coach.
Mock interview package (3)	\$249	45 minutes each. Pre-superday prep or final-round polish.
Coaching credits — 5-pack	\$299	Five 30-min 1:1 sessions. Best per-session rate.

Referral Program

Refer a friend who enrolls and earn a cash reward — the higher the tier, the bigger the reward.

\$100	\$250	\$500
Self-Paced	Flagship	Full Access

It works both ways: the friend you refer gets that same amount off their own enrollment.
Refer someone into Flagship and you each get \$250 — a \$250 reward for you, \$250 off for them.

Refer a friend and track your rewards at pwmpathway.com/refer.

Start Free

Prefer to test the waters first? The **Introduction to Private Wealth Management** course (7 lessons) and the **Top 10 Interview Questions** guide cost nothing — and a free 15-minute consultation is a no-pitch conversation about whether this career fits you.

Ready to start? Enroll in Self-Paced or Flagship instantly at pwmpathway.com/pricing, or apply for Full Access at pwmpathway.com/application.