

Factsheet

Program for financial analyst and portfolio manager with Advanced Federal Diploma/CIIA®

The study program is a financial training with a focus on financial analysis and portfolio management and provides profound knowledge about the valuation of assets and investment decisions and the construction and management of often complex portfolios, qualifying the students for executive positions in their field.

Target audience

The program is aimed at experienced financial analysts, investment managers, asset managers, portfolio and fund managers, investment advisors, derivatives and structured products specialists, IT experts and journalists or lawyers operating in the financial sector.

Content

- Financial accounting and financial statement analysis
- Corporate finance
- Equity valuation and analysis
- Economics
- Valuation and analysis of bonds and derivatives
- Portfolio management
- Ethics, regulation and taxes

Admission

The program is conceived as in-service training. The diplomas are only issued if the number of years of professional experience, as shown below, has been satisfied:

Apprenticeship/Swiss Matura	5 years
Degree University of sciences	3 years
University degree	2 years

Format

Classroom teaching or distance-learning
Teaching: 6-8 lessons twice per week, starting at 16.30

Start

End of January (distance-learning any time)

Duration

2 semesters
The time necessary to complete the program is about 600-800 hours, depending on the students' previous knowledge, corresponding to around 16 hours per week. In the classroom teaching format, around 200 hours of the total effort are teaching lessons.

Examination

Intermediary exam	3 multiple choice exams (MCQ)
Final exam	3 open questions exams, including one with multiple-choice questions
Dates	September, March

The Swiss Financial Analysts Association SFAA as the parent company of the AZEK training centre is the organization that the Swiss Confederation has recognised as the examining and awarding body in relation to the diplomas.

Certifications and recognition

Advanced Federal Diploma of financial analyst and portfolio manager and Certified International Investment Analyst CIIA®, recognised by financial analyst associations worldwide. The SFAA membership is a prerequisite for the international diploma.

«A demanding training program, very well renowned in the financial industry. The qualification allowed me to develop professionally immediately after graduation.»

Venues

Classroom teaching,	Zurich, Geneva
intermediate exam	Interlaken
Final exam	Interlaken

Languages

Classroom teaching	German (Zurich), French (Geneva)
Study material	English
Examination	German, French, English, Italian

Costs

In-class teaching	CHF	10'800
Distance-learning	CHF	9'200
Examination	CHF	3'200 (foundation and final)

Students having paid the training expenses themselves are entitled to reclaim 50% of the costs from the Swiss Confederation (conditions see [here](#)). The final examination of CHF 1'600 are not subject to the refund.

Continuous professional development

With a vast number of seminars and regularly held lunch presentations on current financial market topics, the graduates are offered different opportunities for their professional development and network building.

Optional preparatory courses

We offer optional preparatory courses in accounting (CHF 480) and mathematics (CHF 1'090) in December and January. The courses are recommended for candidates without thorough previous knowledge and are offered in classroom teaching only.

For more information and any further questions

AZEK	☎	+41 (0)44 872 35 35
Feldstrasse 80	✉	info@azek.ch
8180 Bülach		www.azek.ch