AZEK SWISS TRAINING CENTRE FOR INVESTMENT PROFESSIONALS
SFAA SWISS FINANCIAL ANALYSTS ASSOCIATION
aiwm Association of International Wealth Management

Factsheet

Associate Wealth Manager with Federal Diploma/AWM®

The study program is a financial training with a focus on wealth management and provides the basic knowledge for wealth management advisors, consisting in wealth management, financial instruments, law and tax topics.

Target audience

The program is aimed at all client advisors, in particular in the areas of investment advisory, financial planning, wealth management and private banking.

Content

Wealth Management

- Wealth accumulation
- Wealth accumulation, discovery and marketing
- Understanding a client's risk tolerance
- Introduction into portfolio management strategy
- Portfolio management process
- Fundamental analysis
- Technical analysis
- Mutual fund selection
- Analysis of non-conventional asset classes and their structures
- International investing
- Basics of portfolio solutions
- Management of investment risks
- Portfolio monitoring and performance attribution
- Sustainable and responsible investment

Financial instruments

- Money market instruments
- Bonds
- Equity
- Forwards
- Futures
- Options
- Funds
- Structured products
- Lombard loan

Law

- Practicing as a provider of financial services
- Acquisition and canvassing of customers
- Customer acceptance process
- Identification of the client's investment dimension
- Beginning a business relationship with a customer
- Management mandates
- Use of financial products
- Rules under administrative and criminal lax
- Rules applying to disputes between client and bank
- Specific rules applying to interactions with other financial intermediaries

Taxation

- Introduction to the standard income model
- Calculation of taxable income from equity-like and bond-like financial instruments

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	3 years
Degree university of sciences	2 years
University degree	1 year

Format

Distance-learning

Start and duration

Start any time

Duration: The time necessary to complete the program is 200-300 hours for advisors without experience. Depending on the student's previous knowledge time required will differ.

Examination

Format	2 multiple-choice and open questions exams
Dates	June, November

The Swiss Financial Analysts Association SFAA, AZEK's parent company, is recognized by the Swiss Confederation as the examining and awarding body in relation to the Diplomas.

Certification and recognition

Federal Diploma for Associate Wealth Manager and International Certificate for Associate Wealth Manager AWM®. The SFAA membership is a prerequisite for the international diploma.

« A comprehensive basic knowledge program for advisors in wealth management »

Venues

Examination	Zurich, Geneva

Languages

Study material	German, French and English
Examination	German, French, English, Italian

Costs

Training program	CHF 4'600
Examination	CHF 1'300

Students having paid the training expenses themselves are entitled to reclaim 50% of the costs from the Swiss Confederation (conditions see here). The examination costs are excluded

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.

For more information and any further questions

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