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

Factsheet

Expert in Wealth Management with Advanced Federal Diploma/CIWM®

The study program provides in-depth knowledge with respect to the client's investment strategy and asset allocation in the regulatory and tax framework, based on a holistic long-term approach and taking into account the client's position, goals and risk tolerance. It qualifies candidates for executive positions in their field.

Target audience

The program is aimed at experienced investment advisors, financial planners, wealth managers, asset managers and professionals in private banking.

Content

- Wealth Management
  - Basic principles, client profile, portfolio selection and optimization, investment policy, hedging strategies
- Financial instruments
- Behavioral Finance
- Relationship Management
- Tax
  - Taxation of derivatives, structured products
- Law
  - Client acquisition and follow-up, product distribution, sustainable investments, pension systems, succession planning, real estate law
- Corporate Finance
- Financial Planning

Admission

With AWM, CIIA, SAQ certification (CWMA of Affluent Clients), bachelor in banking and finance from a university of applied sciences, a college of higher education or a university.

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 (presential or via zoom) or distance-learning

Teaching: 6-8 lessons per week, on two evenings starting at 16.30.

Start

September (distance-learning any time)

Duration

1 semester

The time necessary to complete the program is 300-400 hours, depending on the students' previous knowledge, corresponding to around 16 hours per week. In the classroom teaching format, around 100 hours of the total effort are teaching lessons.

Examination

Format	2 written exams (open questions), 1 oral exam
Dates	March, September

Certifications and recognition

Advanced Federal Diploma for expert in wealth management and Certified International Wealth Manager CIWM®, internationally recognized. The use of the title CIWM requires membership of the Swiss Financial Analysts Association SFAA.

« The program allowed me to acquire an in-depth financial and investment knowledge within a short timeframe. This knowledge forms the basis of my daily work. »

Venues

In-class teaching	Zurich, Geneva
Examination	Interlaken

Languages

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

Costs

In class teaching	CHF 5'400 (presence/via zoom)
Distance-learning	CHF 4'600
Examination	CHF 1'600

Students are entitled to reclaim 50% of the training expenses from the Swiss Confederation (conditions see www.sbfi.admin.ch).The examination costs of CHF 1'600 are not subject to the refund.

Optional preparatory courses

Optional preparatory courses in accounting (CHF 480) and mathematics (CHF 1'090) in December and January, recommended for candidates without thorough previous knowledge.

For more information and any further questions

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