

## MEDIA RELEASE

### AZEK launches two new training courses: "Fintech" and "ESG for Client Advisors Lending"

- The "Fintech" course qualifies participants to explain the world of Fintech and make it tangible. Graduates will then be able to evaluate and classify current developments, point out correlations and draw conclusions.
- The "ESG for Client Advisors Lending" course enables financial professionals to discuss sustainable investment solutions with clients in a well-founded manner and to offer them financing and credit solutions that meet their needs and are risk appropriate.

Zurich, May 2022 - The new training courses are aimed at specialists in the areas of financial analysis, asset management, portfolio management, financial planning, mortgages, loans, as well as experts in supporting functions in client advisory services.

#### Closing knowledge gaps in the area of Fintech

Understanding digital transformation in the financial industry, critically questioning it and putting individual developments into a meaningful context is a major challenge. There is a lack of systematic guidance for classification, but also for practical utilisation of the current state of knowledge. To close this gap, the AZEK training center is now offering the practice-oriented course "Fintech: The essentials for practice". It qualifies participants to explain current developments in Fintech and make them tangible. After successfully completing the course, participants will be able to discuss current developments in the field of Fintech in a well-founded manner and offer clients investment solutions that meet their needs and are risk adequate.

The programme comprises six online seminars of two hours each and is concluded with a multiple-choice examination. Together with the preparation and follow-up, the learning effort amounts to 30 to 35 hours. After successfully completing the exam, the AZEK certificate "Fintech: The essentials for practice" is awarded. The course will be held in German for the first time in autumn 2022. From 2023, the training will also be offered in French.

AZEK CEO Andreas Jacobs explains: "This practice-oriented online training enables participants to advise clients competently on all questions in the area of Fintech and to work with them to develop solutions that meet their needs."

#### Range of ESG training courses to be expanded

The criteria of environment, social and governance (ESG) have recently gained in importance. In the financial sector, solutions and products must be ESG-compatible. Financial professionals are accordingly required to acquire the necessary knowledge. This is the only way they can competently advise and support their clients on the topic of sustainability. AZEK has therefore already launched a special training course on ESG for client advisors in the investment sector.

To cover the training needs of professionals in the field of mortgages and financing on ESG, AZEK has decided to offer two additional online modules on the topic of "Sustainable Lending". The new course "ESG for client advisors lending" is aimed at experts in the fields of financing and mortgages. It comprises modules 1 and 2 of the existing ESG course as well as the two new modules on "Sustainable Lending" and is completed with a multiple-choice examination. The learning effort including preparation and follow-up is 20 to 25 hours. The course will be held in German for the first time in autumn 2022. From 2023, the training will also be offered in French.

Andreas Jacobs says: "We are pleased to add the 'ESG for client advisors lending' to the range of ESG training courses and thus contribute to a stronger anchoring of sustainability in the financial industry."

## **Media contact**

AZEK AG / SFAA  
Marianne Bonato  
Tel. +41 (0)44 872 35 41  
[bonato@azek.ch](mailto:bonato@azek.ch)

## **AZEK Training Centre and SFAA Analysts Association**

The AZEK Training Centre for Financial Professionals was founded in 1990 by the Swiss Financial Analysts Association SFAA. AZEK is a leading provider of financial education in Switzerland on financial analysis & portfolio management, wealth management, financial market operations, financial data science and ESG. The training programs combine comprehensive theoretical knowledge with a strong practical focus and can also be completed in online format. Graduates with Federal and International Diplomas benefit from a broad range of further education opportunities.