

Wealth Management

Associate Wealth Manager with Federal Diploma/AWM
Expert in Wealth Management with Advanced Federal Diploma/CIWM



AZEK training centre for professionals in finance

About us

Profile

- In-service training programs, continuous professional development courses and seminars for financial professionals
- National and international diplomas at different graduation levels.
- Our lecturers are highly qualified and experienced experts.
- Tailormade solutions for corporates.

Mission statement

- We contribute to the standing of the Swiss financial sector by offering a set of high-quality training programs to cover the specific needs of both the financial professionals and their employers.
- We offer different platforms to strengthen the network and continuous professional development of the diploma holders.
- Quality is key to us: We take particular care in choosing our lecturers and in the elaboration of our study material.

Our training programs

Available both within Switzerland and internationally, we offer demanding training programs with a strong practical orientation in financial analysis, wealth management, financial market operations, financial data science and ESG.

Strong reasons for choosing AZEK

- Combination of comprehensive theoretical foundation and strong practical orientation.
- All programs can be followed in distance-learning format.
- Specific program study material is developed and regularly updated, in particular with regard to the new regulatory requirements.
- Wide range of continuing training opportunities, covering current financial market topics with a focus on wealth management, financial instruments, regulation and taxes.
- For programs with Federal Diplomas, students are entitled to reclaim 50% of the training expenses from the Swiss Confederation.

SFAA

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

The AZEK study programs in wealth management

Competent advisory in private banking/wealth management is based on a holistic long-term approach. It presupposes a comprehensive understanding of the client's situation, combined with a solid knowledge about the financial market and the applicable legal framework. The core knowledge program is completed by the Federal Diploma/AWM, the advanced knowledge program by the Advanced Federal Diploma/CIWM.

Associate Wealth Manager with Federal Diploma / AWM®

The study program 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
- Client's risk tolerance
- Portfolio management
- Fundamental and technical analysis
- Mutual fund selection and analysis
- 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

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 law
- 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, can be started 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 exams, one multiple-choice and one with open questions
Dates	June, November

Certification and recognition

Associate Wealth Manager with higher Federal Diploma AWM®, internationally recognized. The use of the title AWM requires membership of the Swiss Financial Analysts Association SFAA.

«A comprehensive core knowledge program for all client advisors in wealth management»

Venues

Examination	Zurich, Geneva
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Languages

Study material	Learning platform in English Scripts per chapter (pdf) available in English, German and French.
Examination	German, French, English, Italian

Costs

Training program	CHF 4'600
Examination	CHF 1'300

Students are entitled to reclaim 50% of the training expenses from the Swiss Confederation (conditions see www.seri.admin.ch). The examination costs of CHF 1'300 are not subject to the refund.

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 or 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, shown below, has been satisfied:

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

Format

Classroom teaching

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

Start

September

Duration

1 semester

The time necessary 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

Certification 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 which forms the basis of my daily work.»

Venues

In-class teaching,	Zurich, Geneva
Examination	Interlaken

Languages

In-class teaching	German (Zurich), French (Geneva)
Study material	English
Examination	German, French, English, Italian

Costs

In class teaching	CHF 6'500 (presence/via zoom)
Examination	CHF 1'600

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

Optional preparatory courses

Optional preparatory courses in accounting (CHF 660) and mathematics (CHF 1'310) in December and January, recommended for candidates without thorough previous knowledge.

Lecturers of the AZEK study programs

Albisetti Alessandro, Banque Pictet
Altorfer Christian, Pureos Partners AG
Ballmer Christian C., IAZI AG
Dr. Beiner Nicole, NB RiskControl
Me Bétrisey Frédéric, Bär & Karrer
Bienz Pius, Université de Lausanne
Bilecen Erol, Raiffeisen Schweiz Genossenschaft
Bion Jérôme, Banque Lombard Odier
Dr. Blanco José Antonio, Swiss Life
Bonnaz Thierry
Braun Johanna, Universität Zürich
Braunschweig Stefan, Credit Suisse
Brügger Fabien, Banque Cantonale Vaudoise
Prof. Dr. Chaieb Ines, Université de Genève
Prof. Costanzo Antonio Gabriele, Centro di Studi Bancari
Dr. Courvoisier Matthias, Baker & McKenzie
de Rosa Salvatore, Eri Bancaire
de Wolff Angela, Conser
Dr. Donegani Michel, PrismoInvest
Prof. Dr. Dumont Pierre-André
RA Dürst Jennifer, Staiger Rechtsanwälte
Me Fera Gianni, BianchiSchwald SARL
Fischer Philipp, OBERSON ABELS
Frei Pascal, PPCmetrics
Fuchs Alain Bernhard A& R Consulting GmbH
Fusetti Alfredo, PPCmetrics
Grunow Jan, Swiss Life Asset Management AG
Haas Robert
Prof. Dr. Hens Thorsten, Universität Zürich
Prof. Dr. Hoesli Martin, Université de Genève
Hofer Stéphane, inCompliance
Mr Horni Martin, BRP Bizzozero & Partners
Mr Hoxha Brahim, Banque Pictet
Dr. Illmer Stefan, Illmer Investment Performance Consulting
Dr. Jacobs Andreas, AZEK
Prof. Dr. Kaas Leo, Goethe Universität Frankfurt
Kanaah Abdul, Etude de Mes Jeandin & Defacqz
Mr Kirchhofer Fabian, CYP
Klein Fritz Thomas
Dr. iur. Kratz-Ulmer Aline, Hubatka Müller Vetter Rechtsanwälte
Dr. Künzle Christoph, ZHAW School of Management and Law
Kurmann Benjamin, BRP Bizzozero & Partners
Lacraz Thierry, Banque Pictet
Lattmann Laurent, Tax Partner
Laville Jean, Conser
Lawson Tom, Tax Partner
Lechner Herbert, Credit Suisse (Schweiz) AG
Dr. Lhabitant François-Serge, Kedge Capital
Dr. Liechti Diego, Nest Sammelstiftung
Maillard Sophie, BRP Bizzozero & Partners
Dr. Maraia Jean-Frédéric, Schellenberg Wittmer
Mentha Yvar, BRP Bizzozero & Partners
Meyer Julia, ZHAW School of Management and Law
Moulet Nicolas, Cité Gestion
Neher Agnes, Baloise Asset Management AG
Dr. Nicolodi René, Zürcher Kantonalbank
Prof. Dr. Olarreaga Marcelo, Université de Genève
Orelli Stefano, SUPSI
Prof. Dr. Passardi Marco, Institut für Finanzdienstleistungen
Zug IFZ, Hochschule Luzern
Pedrini Maurizio, Zürcher Kantonalbank
Dr. Perrin Julien, LPPV avocats
Dr. Puhan Tatjana Xenia, TOBAM
Dr. Puschmann Thomas, Universität Zürich
Regad Cédric, Swiss Life Pension Services AG
Richter Thomas, ZHAW School of Management and Law
Rouit Blaise, Baloise Asset Management
Ruau Philippe, PHR Conseil & Formation
Dr. Schumacher-Hummel Ingeborg, Responsible Impact Investing
Schweizer Andreas, ZHAW School of Management and Law
Prof. Dr. Sieber René, Université de Genève
Stahl Eric, Banque Lombard Odier
Stiffler Paul, Swisscom (Schweiz)
Dr. Tuchschnid Nils, Haute école de gestion Fribourg
Prof. Dr. Valta Philip, Universität Bern
Vialis Nicolas, Banque Thaler
Vidy Timothée, Banque Lombard Odier & Cie SA
Dr. Vlcek Martin, Banque Cantonale Vaudoise
Dr. von Ah Roman, Swiss Rock Asset Management
von Burg Ueli, Zürcher Kantonalbank
von Türk Myers Claudia, Banque Lombard Odier
RA Wiesendanger Désirée, Staiger Rechtsanwälte
Dr. Wilding Benjamin, Universität Zürich
Dr. Zweifel Patrick, Banque Pictet

Testimonials



«The AZEK Diplomas are accepted throughout Switzerland. I acquired the Certified International Wealth Manager Diploma and can prove my ability vis-à-vis my employer as well as towards the clients and other financial market participants. I highly recommend the program to everybody as it opens up new options for career development and expanding the personal network. In addition, the numerous events AZEK is offering serve as a platform to stay in contact with fellow students and make new acquaintances. »

Noam Rey, Bank CIC (Schweiz)



«From project manager in marketing to team head in asset management. The AZEK was a career springboard for a new professional challenge. The AZEK training programs are highly renowned in the Swiss financial sector and supported me a lot in my professional development. I particularly appreciated the concept: broad and deep knowledge in finance and investment, taught by highly qualified lecturers. The practice-oriented content build now the basis of my daily work. Challenging and encouraging at the same time – this is AZEK. »

Daniela Jenni, Zürcher Kantonalbank



«I recommend the AZEK without reservation because graduates strongly benefit from the program. With the comprehensive training program I acquired knowledge across the topics related to investment both on a theoretical and practical level and it stimulated my reflection. In addition, I established new contacts and the diploma opens up new opportunities with employers. For all these reasons I consider to attend another AZEK program. »

Patrick Hasler, Credit Suisse

Who do our graduates work for?

Aargauische Kantonalbank ■ ABB ■ ABN AMRO ■ AIG ■ Allianz Suisse ■ Avaloq ■ AXA Winterthur ■ Bank CIC ■ Bank Coop ■ Bank J. Safra Sarasin ■ Bank Julius Bär ■ Bank Leumi ■ Bank Lombard Odier & Cie ■ Bank Syz & Co ■ Bank Vontobel ■ Barclays Bank ■ Basellandschaftliche Kantonalbank ■ Basler Kantonalbank ■ Basler Versicherungen ■ Berner Kantonalbank ■ BMPI ■ BNP Paribas ■ BSI ■ BZ Bank ■ Centro di Studi Bancari ■ Citibank ■ Commerzbank ■ Cornèr Banca ■ Coutts & Co ■ Crédit Agricole ■ Credit Suisse ■ Deutsche Bank ■ Dreyfus Söhne & Cie ■ DZ Privatbank ■ EFG Bank ■ Eidg. Bankenkommission ■ Eidg. Finanzdepartement ■ Ernst & Young ■ Falcon Private Bank ■ Freiburger Kantonalbank ■ GE Money Bank ■ Generali ■ Genfer Kantonalbank ■ Goldman Sachs ■ Graubündner Kantonalbank ■ Groupe Mutuel ■ Helvetia ■ Holcim ■ Hottinger & Cie ■ HSBC ■ JP Morgan ■ Jyske Bank ■ KBL ■ KPMG ■ LGT Bank in Liechtenstein ■ Liechtensteinische Landesbank ■ Luzerner Kantonalbank ■ McKinsey ■ Migros Bank ■ Milesi Asset Management ■ Mirabaud & Cie ■ Mizuho Bank ■ Morgan Stanley ■ Neue Aargauer Bank ■ Nordea ■ Notenstein Private Bank ■ Pensionskasse SBB ■ Pictet & Cie ■ Pricewaterhouse Coopers ■ Privatbank Edmond de Rothschild ■ Rahn & Bodmer ■ Raiffeisen ■ Royal Bank of Canada ■ Saxo Bank ■ Schaffhauser Kantonalbank ■ Schroder & Co. ■ Schweizerische Mobiliar Versicherungs-gesellschaft ■ Schweizerische Nationalbank ■ Schweizerische National Versicherung ■ Schwyzer Kantonalbank ■ SIX Swiss Exchange ■ St. Galler Kantonalbank ■ Swisscanto ■ Swiss & Global Asset Management ■ Swiss Life ■ Swissquote Bank ■ Swiss Re ■ Thomson Reuters ■ Thurgauer Kantonalbank ■ UBS ■ Union Bancaire Privée ■ Urner Kantonalbank ■ Valiant Bank ■ Vaudoise ■ Visana ■ VP Bank ■ VZ Vermögenszentrum ■ Waadtländer Kantonalbank ■ Walliser Kantonalbank ■ Zuger Kantonalbank ■ Zürcher Kantonalbank ■ Zurich Financial Services