Factsheet

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 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, 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

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 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

For more information and any further questions

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