Factsheet

Program for financial analyst and portfolio manager with Advanced Federal Diploma/CIIA®

The study program provides profound knowledge about the valuation of assets and investment decisions and the construction and management of often complex portfolios, qualifying the students for executive positions in their field.

Target audience

The program is aimed at experienced financial analysts, investment managers, asset managers, portfolio and fund managers, investment advisors, derivatives and structured products specialists, IT experts and journalists or lawyers operating in the financial sector.

Content

- Financial accounting and financial statement analysis
- Corporate finance
- Equity valuation and analysis
- Economics
- Valuation and analysis of bonds and derivatives
- Portfolio management
- Ethics, regulation and taxes

Admission

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
Bachelor of sciences	3 years
University degree (Master)	2 years

Format

Teaching (presential or via zoom) or distance-learning

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

Start

End of January (distance-learning any time)

Duration

2 semesters

The time necessary to complete the program is about 600-800 hours, depending on the students' previous knowledge, corresponding to around 16 hours per week. In the classroom teaching format, around 200 hours of the total effort are teaching lessons.

Examination

Intermediary exam	3 multiple-choice questions exams
Final exam	3 open questions exams, whereof one with multiple-choice questions
Dates	September, March

Certifications and recognition

Advanced Federal Diploma of financial analyst and portfolio manager and Certified International Investment Analyst CIIA®, recognised by financial analyst associations worldwide. The use of the title CIIA requires membership of the Swiss Financial Analysts Association SFAA.

«A demanding training program, very well renowned in the financial industry. The qualification allowed me to develop professionally immediately after graduation. »

Venues

In-class teaching	Zurich, Geneva
Intermediate exam	Interlaken
Final exam	Interlaken

Languages

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

Costs

In-class teaching	CHF	10'800 (presence/via zoom)
Distance-learning	CHF	9'200
Examination	CHF	3'200 (foundation and final)

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

Optional preparatory courses

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

For more information and any further questions

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