

## 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)

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

#### Start

September

#### 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 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](http://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.

#### For more information and any further questions

AZEK	☎	+41 (0)44 872 35 35
Feldstrasse 80	✉	<a href="mailto:info@azek.ch">info@azek.ch</a>
8180 Bülach		<a href="http://www.azek.ch">www.azek.ch</a>