

## Digitalisation in the financial industry

AZEK Certificate Digitalisation



### Offer

Understanding the digital transformation in the financial industry, taking a critical look at it and putting the individual developments into context is a major challenge. There is a lack of systematic guidance on how to classify developments, but also how to make practical use of them.

In order to close this gap, AZEK developed this new course. The program qualifies participants to explain the digital transformation, evaluate and classify developments, point out correlations and draw conclusions.

The course is practice oriented. After successful completion, participants understand their role and development opportunities in the context of digital change.

### Benefit

- Targeted and compact further training in approx. 2 months
- Attractive, interactive live-online format
- Understand the digital transformation and one's own role in it
- Critically assess investment solutions and advise clients appropriately
- AZEK certificate after successful completion of the program

### Target audience

The course is aimed at professionals and practitioners in the financial sector with and without client contact (client advisors, financial analysts, wealth managers, asset and portfolio managers, financial planners, product specialists, etc.).

### Learning objectives

- Understanding change in the financial industry
- Understand, critically evaluate, classify and discuss drivers of the digital revolution
- Explain key terms and developments
- Be able to provide orientation within reference framework
- Recognize how digital transformation supports sustainability
- Understanding the concept of the ecosystem digitalisation
- Discuss new business models
- Know the regulatory framework and developments
- Offer clients investment solutions tailored to their needs
- Provide a well-founded outlook on the role of financial institutions in the future
- Understanding the own role and development opportunities

### Content

#### Module 1: Transformation of the financial industry

Outlines the transformation of the financial industry through digitalisation. This includes the evolution of money and novel concepts such as cryptocurrencies, stable coins as well as the drivers of transformation and the phases of digitalisation.

#### Module 2: The digital revolution

Describes the digital revolution and links to existing banking IT and the strategic relevance and costs of IT in financial institutions. Building on these foundations, digital technologies such as artificial intelligence, blockchain, etc. are explained and their role in the context of fintech and insurtech is explained using a reference model.

#### Module 3: Applications

Describes concrete applications that cover all financial processes, including digital advisory, digital banking services, open banking infrastructures, digital token exchanges, blockchain applications and artificial intelligence applications.

#### Module 4: Sustainability and digitalisation

Explains how digitalisation supports the move towards sustainability. This includes areas such as green fintech, blockchain-based applications in the sustainability sector and a framework for sustainable digital finance.

#### Module 5: Digital ecosystems

Explains the concept of digital financial ecosystems. It addresses novel forms of customer and provider interaction, key mechanisms of digital ecosystems, market competition, regulation and regtech.

#### Module 6: Digitalisation and the financial system of the future

Describes the role and growing importance of digitalisation in the financial system of the future. This includes, for example, digital central bank currencies, digital stock exchanges as well as the cornerstones of regulation and their necessary adjustments.

### Format

Six live online seminars, each lasting 2 hours. The seminars are recorded and posted on the AZEK learning platform together with the associated presentations, including references and further reading as well as test questions for exam preparation.

### Start and duration

The course is organised twice a year in spring and autumn. Course duration incl. examination is approx. 2 months. The dates are published on [www.azek.ch](http://www.azek.ch). The learning effort including the six live online seminars is approx. 30-35 hours.

### Examination and certificate

The course is completed with a 60-minute online examination (multiple choice questions). Upon successful completion of the exam, the AZEK Certificate Digitalisation is awarded.

### Language

German and French.

### Costs

CHF 1'950 for six online seminars incl. study material and examination. CHF 150 per additional examination attempt.

### Contact

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## Lecturers



### **Dr. Thomas Puschmann**

Thomas Puschmann has been working at the interface of technology and business for more than two decades. He is Founder and Director of the Swiss FinTech Innovation Lab at the University of Zurich and he founded the Sustainable Digital Finance Research Initiative in Zurich and Stanford. In addition, he is Co-Founder of the Association Swiss FinTech Innovations, the Swiss Green FinTech Network, the Extreme Tech Challenge Switzerland and Member of the Swiss Innovation Council Innosuisse. He serves as an advisor for many strategic national and international initiatives and is an advisory board member of various institutions to foster innovation and develop an innovation and start-up fintech ecosystem. Before his current position he was heading a financial services research project at the Universities of Leipzig and St. Gallen and was a visiting scholar at Stanford University and MIT Sloan School of Management. Prior to this, Thomas spent five years in consulting and software development, where he was a member of the executive board at ESPRiT Consulting (now Q\_Perior) and The Information Management Group. Thomas was a co-author of the first German book on the digitalization of the financial industry and has published many articles on fintech.



### **Dr. Pius Bienz**

Pius Bienz is an experienced senior project and program manager (certified PMP), mainly in large bank IT and digital transformation projects, and now an investor and board member in start-ups and traditional companies. Since 2005, Pius has been teaching in academic and business contexts, among others for Swiss Finance Institute (SFI), Universities of Lausanne, Zurich and Fribourg as well as for Institut Supérieur de Formation Bancaire (ISFB). He has a keen interest in applied management research and founded the Bank Innovation Competence Center (BAICC) at HEC Lausanne in 2017. Pius is an experienced executive with proven relationship management skills in an international context. He has in-depth knowledge of the financial services industry, mainly in Switzerland, Germany and Luxembourg, and has been working in financial centers such as New York, London, Hong Kong and Singapore. Pius has been a partner with Accenture and IBM GBS.