

## STUNDENPLAN 2021 Finanz- und Anlageexperten/CIWM

Hybrid Kurs (vor Ort oder via Zoom)

Der Präsenzunterricht findet im Technopark an der Technoparkstrasse 1 sowie an der HWZ, Lagerstrasse 5 in Zürich statt.

Datum	Zeit	Vorlesung	Dozent	
<b>August 2021</b>				
Mo 30	16.30 - 20.30	Financial Instruments	F.S. Lhabitant (English)	Exotic options, Interest rate swaps
<b>September 2021</b>				
Do 02	16.30 - 20.30	Financial Instruments	F.S. Lhabitant (English)	Total return swap, CFD, Credit default swaps
Mo 06	16.30 - 18.30	Financial Instruments	D. Scognamiglio	Asset class - integration of real estate in the mixed ...
	18.30 - 20.30	Financial Instruments	A. Fuchs	Financing of real estate
Do 09	16.30 - 20.30	Financial Instruments	D. Scognamiglio	Valuation and indices of real estate
Mo 13	<b>Knabenschieszen</b>			
Di 14	16.30 - 18.30	Wealth Management	R. von Ah	Theoretical principles
	18.30 - 20.30	Wealth Management	S. Braunschweig	Customer profiles
Do 16	16.30 - 17.30	Wealth Management	R. von Ah	Customer profiles
	17.30 - 20.30	Wealth Management	R. von Ah	Portfolio optimization and selection
Mo 20	16.30 - 19.30	Wealth Management	R. von Ah	Portfolio optimization and selection
Di 21	16.30 - 19.30	Wealth Management	R. von Ah	ALM for private clients
Di 28	16.30 - 19.30	Wealth Management	R. von Ah	ALM for private clients
Do 30	16.30 - 20.30	Financial Instruments	S. Orelli	Structured products
<b>Oktober</b>				
Di 05	16.30 - 20.30	Corporate Finance	J. Braun	Company financial analysis and strategy
Do 07	16.30 - 20.30	Corporate Finance	J. Braun	Corporate finance and value creation
Di 12	16.30 - 18.30	Corporate Finance	J. Braun	Mergers and acquisitions
	18.30 - 20.30	Corporate Finance	J. Braun	Equity and market structures
Do 14	16.30 - 20.30	Corporate Finance	J. Braun	Equity and market equilibrium
Di 19	16.30 - 20.30	Wealth Management	A. Jacobs	Hedging strategies
Do 21	16.30 - 18.30	Wealth Management	A. Jacobs	Hedging strategies
	18.30 - 20.30	Financial Instruments	A. Albisetti (English)	Life insurance
Di 26	16.30 - 19.00	Tax	F.S. Lhabitant (English)	Personal and corporate tax
	19.00 - 21.00	Law	J. Dürst-Zimmermann	Property law
Do 28	16.30 - 18.45	Law	J. Perrin (English)	Trusts
	18.45 - 21.00	Law	M. Courvoisier	Inheritance law
<b>November</b>				
Mi 03	Ort 1) 16.30 - 20.30	Law **	M. Horni	Collective investment schemes
Mo 08	Ort 1) 16.30 - 20.30	Tax **	L. Lattmann / T. Lawson	Taxation of collective investment schemes
Mi 10	Ort 1) 16.30 - 21.00	Law **	B. Kurmann / I. Arapovic	Wealth Management in the broader sense
Mo 15	Ort 1) 16.30 - 18.45	Law **	D. Biedermann	Social responsible investment
	18.45 - 21.00	Law**	A. Kratz-Ulmer	Pension systems
Mi 17	Ort 1) 16.30 - 21.00	Law **	B. Kurmann	Acquisition, acceptance and monitoring
Mi 24	Ort 1) 16.30 - 20.30	Tax **	F.-S. Lhabitant (English)	Taxation of derivatives, Taxation of structured products
Di 30	16.30 - 20.30	Behavioural Finance	Th. Hens	Behavioural finance
<b>Dezember</b>				
Do 02	16.30 - 20.30	Behavioural Finance	Th. Hens	Behavioural Finance
Di 07	16.30 - 20.30	Behavioural Finance	Th. Hens	Behavioural Finance
Do 09	16.30 - 20.30	Financial Planning	F. Kirchhofer	Financial Planning
Di 14	16.30 - 20.30	Financial Planning	F. Kirchhofer	Financial Planning
Do 16	16.30 - 20.30	Reserve Datum		
Mo 20	16.30 - 20.30	Reserve Datum		
<b>Januar 2022</b>				
Do 06	16.30 - 20.30	Relationship Management	N. Gaspardo	Interpersonal Business Relationship (IbR): Structure & Economics
Mo 10	16.30 - 21.00	Relationship Management	N. Gaspardo	HNWI Relationship Management: WM's role and relevant value proposition
Di 11	16.30 - 21.00	Relationship Management	N. Gaspardo	Managing relational special circumstances: optimizing a WM performance
Di 18	16.30 - 20.30	Reserve Datum		

Ort 1): HWZ  
mit CIIA \*\*