

STUNDENPLAN 2022 Finanz- und Anlageexperten/CIWM

Hybrid Kurs (vor Ort oder via Zoom)

Der Präsenzunterricht findet im Technopark an der Technoparkstrasse 1 in Zürich statt.

Datum	Zeit	Vorlesung	Dozent	
August 2022				
Di 30	16.30 - 20.30	Financial Instruments	F.S. Lhabitant (English)	Exotic options, Interest rate swaps
September 2022				
Do 01	16.30 - 20.30	Financial Instruments	F.S. Lhabitant (English)	Total return swap, CFD, Credit default swaps
Mo 05	16.30 - 18.30	Financial Instruments	R. Ballmer	Asset class - integration of real estate in the mixed ...
	18.30 - 20.30	Financial Instruments	A. Fuchs	Financing of real estate
Do 08	16.30 - 18.30	Wealth Management	R. von Ah	Customer profiles, Theoretical principles
	18.30 - 20.30	Wealth Management	S. Braunschweig	Customer profiles
Mo 12	Knabenschlessen			
Mi 14	16.30 - 17.30	Wealth Management	R. von Ah	Theoretical principles
	17.30 - 20.30	Wealth Management	R. von Ah	Portfolio optimization and selection
Do 15	16.30 - 20.30	Financial Instruments	R. Ballmer	Valuation and indices of real estate
Di 20	16.30 - 19.30	Wealth Management	R. von Ah	Portfolio optimization and selection
Do 22	16.30 - 19.30	Wealth Management	R. von Ah	ALM for private clients
Di 27	16.30 - 19.30	Wealth Management	R. von Ah	ALM for private clients
Do 29	16.30 - 20.30	Financial Instruments	S. Orelli	Structured products
Oktober				
Mi 05	16.30 - 20.30	Corporate Finance	J. Braun	Company financial analysis and strategy
Do 06	16.30 - 20.30	Corporate Finance	J. Braun	Corporate finance and value creation
Mi 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 13	16.30 - 20.30	Corporate Finance	J. Braun	Equity and market equilibrium
Di 18	16.30 - 20.30	Wealth Management	A. Jacobs	Hedging strategies
Do 20	16.30 - 18.30	Wealth Management	A. Jacobs	Hedging strategies
	18.30 - 20.30	Financial Instruments	A. Albisetti (English)	Life insurance
Di 25	16.30 - 19.00	Tax	F.S. Lhabitant (English)	Personal and corporate tax
	19.00 - 21.00	Law	J. Dürst-Zimmermann	Property law
Do 27	16.30 - 18.45	Law	A. Kratz-Ulmer	Trusts
	18.45 - 21.00	Law	M. Courvoisier	Inheritance law
November				
Mi 02	16.30 - 20.30	Law **	M. Horni	Collective investment schemes
Mo 07	16.30 - 20.30	Tax **	L. Lattmann / T. Lawson	Taxation of collective investment schemes
Mi 09	16.30 - 21.00	Law **	B. Kurmann / I. Arapovic	Wealth Management in the broader sense
Mo 14	16.30 - 18.30	Law**		SRI Regulations
Mi 16	16.30 - 21.00	Law **	B. Kurmann / I. Arapovic	Client Acquisition, Acceptance and Monitoring
Mo 21	16.30 - 19.30	Law **	A. Kratz-Ulmer	Pension systems
Mi 23	16.30 - 20.30	Tax **	F.-S. Lhabitant (English)	Taxation of derivatives, Taxation of structured products
Di 29	16.30 - 20.30	Behavioural Finance	Th. Hens	Behavioural finance
Dezember				
Do 01	16.30 - 20.30	Behavioural Finance	Th. Hens	Behavioural Finance
Di 06	16.30 - 20.30	Behavioural Finance	Th. Hens	Behavioural Finance
Do 08	16.30 - 20.30	Financial Planning	F. Kirchhofer	Financial Planning
Di 13	16.30 - 20.30	Financial Planning	F. Kirchhofer	Financial Planning
Do 15	16.30 - 19.30	Financial Planning		Entrepreneurs & Executives
Di 20	16.30 - 20.30	Rerserve Datum		
Januar 2023				
Do 05	16.30 - 20.30	Relationship Management	Ch. Künzle	Interpersonal Business Relationship (IbR): Structure & Economics
Di 10	16.30 - 21.00	Relationship Management	Ch. Künzle	HNWI Relationship Management: WM's role and relevant value proposition
Do 12	16.30 - 21.00	Relationship Management	Ch. Künzle	Managing relational special circumstances: optimizing a WM performance
Di 17	16.30 - 20.30	Rerserve Datum		
Do 19	16.30 - 20.30	Rerserve Datum		

mit CIAA **