

STUNDENPLAN 2023 Finanz- und Anlageexperten/CIWM

Hybrid Kurs (vor Ort oder via Zoom)

Der Kurs findet im Bildungszentrum Sihlpost, Sihlpostgasse 2, Zürich statt.

Datum	Zeit	Vorlesung	Dozent	
August 2023				
Di 29	16.30 - 20.30	Financial Instruments	F.S. Lhabitant (English)	Exotic options, Interest rate swaps
Do 31	16.30 - 20.30	Financial Instruments	F.S. Lhabitant (English)	Total return swap, CFD, Credit default swaps
September 2023				
Di 05	16.30 - 18.30	Financial Instruments	R. Ballmer	Asset class - integration of real estate in the mixed asset portfolio
	18.30 - 20.30	Financial Instruments	A. Fuchs	Financing of real estate
Do 07	16.30 - 18.30	Wealth Management	R. von Ah	Customer profiles, Theoretical principles
	18.30 - 20.30	Wealth Management	S. Braunschweig	Customer profiles
Mo 11	Knabenschieszen			
Di 12	16.30 - 20.30	Financial Instruments	R. Ballmer	Valuation and indices of real estate
Do 14	16.30 - 20.30	Financial Instruments	S. Orelli	Structured products
Di 19	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 21	16.30 - 19.30	Wealth Management	R. von Ah	Portfolio optimization and selection
Di 26	16.30 - 19.30	Wealth Management	R. von Ah	ALM for private clients
Do 28	16.30 - 19.30	Wealth Management	R. von Ah	ALM for private clients
Oktober				
Mi 04	16.30 - 20.30	Corporate Finance	J. Braun	Company financial analysis and strategy
Do 05	16.30 - 20.30	Corporate Finance	J. Braun	Corporate finance and value creation
Mi 11	16.30 - 18.30	Corporate Finance	J. Braun	Mergers and acquisitions
	18.30 - 20.30	Corporate Finance	J. Braun	Equity and market structures
Do 12	16.30 - 20.30	Corporate Finance	J. Braun	Equity and market equilibrium
Di 17	16.30 - 20.30	Wealth Management	A. Jacobs	Hedging strategies
Do 19	16.30 - 18.30	Wealth Management	A. Jacobs	Hedging strategies
	18.30 - 20.30	Financial Instruments	A. Albisetti (English)	Life insurance
Di 24	16.30 - 19.00	Tax	F.S. Lhabitant (English)	Personal and corporate tax
	19.00 - 21.00	Law	J. Dürst	Property law
Do 26	16.30 - 18.45	Law	A. Kratz-Ulmer	Trusts
	18.45 - 21.00	Law	M. Courvoisier	Inheritance law
November				
Mi 01	16.30 - 20.30	Law **	M. Horni	Collective investment schemes
Mo 06	16.30 - 20.30	Tax **	L. Lattmann / T. Lawson	Taxation of collective investment schemes
Mi 08	16.30 - 21.00	Law **	B. Kurmann	Wealth Management in the broader sense
Mi 15	16.30 - 21.00	Law **	B. Kurmann	Client Acquisition, Acceptance and Monitoring
Mo 20	16.30 - 19.30	Law **	A. Kratz-Ulmer	Pension systems
Mi 22	16.30 - 20.30	Tax **	F.-S. Lhabitant (English)	Taxation of derivatives, Taxation of structured products
Mo 27	16.30 - 19.30	Portfolio Management	T. Puschmann	Fintech & Data Analytics
Di 28	16.30 - 20.30	Behavioural Finance	Th. Hens	Behavioural finance
Dezember				
Di 05	16.30 - 20.30	Behavioural Finance	Th. Hens	Behavioural Finance
Do 07	17.00 - 21.00	Behavioural Finance	Th. Hens	Behavioural Finance
Di 12	16.30 - 20.30	Financial Planning	F. Kirchhofer	Financial Planning
Do 14	16.30 - 20.30	Financial Planning	F. Kirchhofer	Financial Planning
Do 19	16.30 - 20.30	Reserve Datum		
Januar 2024				
Do 04	16.30 - 20.30	Reserve Datum		
Di 09	16.30 - 20.30	Relationship Management	Ch. Künzle	Relationship Management
Do 11	16.30 - 18.30	Relationship Management	Ch. Künzle	Relationship Management
	18.30 - 20.00	Relationship Management	Ch. Künzle	Executives & Entrepreneurs
Di 16	16.30 - 18.00	Relationship Management	Ch. Künzle	Executives & Entrepreneurs
	18.00 - 21.00	Relationship Management	Ch. Künzle	UHNW/Family Office
Do 18	16.30 - 20.30	Reserve Datum		

mit CIAA **