

AZEK

SWISS TRAINING CENTRE FOR
INVESTMENT PROFESSIONALS

Financial analysis and portfolio management

Expert in financial analysis and portfolio management
with Advanced Federal Diploma/CIIA



SFAA

SWISS FINANCIAL
ANALYSTS ASSOCIATION



Association of
International Investment
Analysts ACIIA

AZEK training centre for professionals in finance

About us

Profile

- Training programs for financial professionals in financial analysis, wealth management and financial market operations.
- National and international diplomas at different graduation levels.
- Our lecturers are highly qualified and experienced experts.
- Tailormade solutions for corporates.

Mission statement

- We contribute to the standing of the Swiss financial sector by offering a set of high quality training programs to cover the specific needs of both the financial professionals and their employers.
- We offer different platforms to strengthen the network and continuous professional development of the diploma holders.
- Quality is key to us: We take particular care in choosing our lecturers and in the elaboration of our study material.

Our training programs

Available both within Switzerland and internationally, we offer demanding training programs with a strong practical orientation in financial analysis, wealth management and financial market operations.

Strong reasons for choosing AZEK

- Combination of comprehensive theoretical foundation and strong practical orientation.
- All programs can be followed in distance-learning format.
- Specific program study material is developed and regularly updated, in particular with regard to the new regulatory requirements.
- Wide range of continuing training opportunities, covering current financial market topics with a focus on wealth management, financial instruments, regulation and taxes.
- Students are entitled to reclaim 50% of the training expenses from the Swiss Confederation.

SFAA

The Swiss Financial Analysts Association SFAA as the parent company of the AZEK training centre is the organization that the Swiss Confederation has recognized as the examining and awarding body in relation to the Diplomas.

The AZEK study program in financial analysis and portfolio management

The program is aimed at experienced investment professionals in the fields of financial analysis and portfolio management. Their knowhow and expertise is a key element in the value chain of the financial institutes. The training combines profound theoretical knowledge with practical skills. Graduates are eligible for senior positions in their field. The program has been developed with the help of internationally experienced and renowned experts.

Program for financial analyst and portfolio manager with Advanced Federal Diploma/CIIA®

The study program provides profound knowledge about the valuation of assets and investment decisions and the construction and management of often complex portfolios, qualifying the students for executive positions in their field.

Target audience

The program is aimed at experienced financial analysts, investment managers, asset managers, portfolio and fund managers, investment advisors, derivatives and structured products specialists, IT experts and journalists or lawyers operating in the financial sector.

Content

- Financial accounting and financial statement analysis
- Corporate finance
- Equity valuation and analysis
- Economics
- Valuation and analysis of bonds and derivatives
- Portfolio management
- Ethics, regulation and taxes

Admission

The program is conceived as in-service training. The diplomas are only issued if the number of years of professional experience, shown below, has been satisfied:

Apprenticeship/Swiss Matura	5 years
Bachelor of sciences	3 years
University degree (Master)	2 years

Format

Classroom teaching or distance-learning

Teaching: 6-8 lessons twice per week, starting at 16.30

Start

End of January (distance-learning any time)

Duration

2 semesters

The time necessary to complete the program is about 600-800 hours, depending on the students' previous knowledge, corresponding to around 16 hours per week. In the classroom teaching format, around 200 hours of the total effort are teaching lessons.

Examination

Intermediary exam	3 multiple-choice questions exams
Final exam	3 open questions exams, whereof one with multiple-choice questions
Dates	September, March

Certifications and recognition

Advanced Federal Diploma of financial analyst and portfolio manager and Certified International Investment Analyst CIIA®, recognised by financial analyst associations worldwide. The SFAA membership is a prerequisite for the international diploma.

«A demanding training program, very well renowned in the financial industry. The qualification allowed me to develop professionally immediately after graduation. »

Venues

In-class teaching	Zurich, Geneva
Intermediate exam	Interlaken
Final exam	Interlaken

Languages

In-class teaching	German (Zurich), French (Geneva)
Study material	English
Examination	German, French, English, Italian

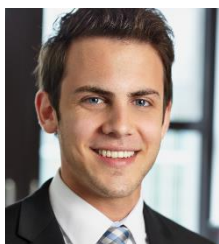
Costs

In-class teaching	CHF 10'800
Distance-learning	CHF 9'200
Examination	CHF 3'200 (foundation and final)

Students are entitled to reclaim 50% of the training expenses from the Swiss Confederation (conditions see www.seri.admin.ch). The final examination of CHF 1'600 is not subject to the refund.

Optional preparatory courses

We offer optional preparatory courses in mathematics (CHF 1'090) and accounting (CHF 480) in December and January. The courses are recommended for candidates without thorough previous knowledge and are offered in classroom teaching only.



«Self-study – classroom teaching – AZEK online platform. The combination of these three instruments were the basis of my successful completion of the CIIA studies. The concept leaves also enough room for questions and interesting discussions. The comprehensive study material is explained in more detail by the highly-experienced lecturers. The knowledge can be tested and deepened with the AZEK online platform by solving old examination papers. The training program is highly intense and demanding and enjoys an excellent reputation in the financial sector in Switzerland. The program helped me to advance my career development and I can apply my newly acquired knowledge in my new position every day. »

Thomas Roth, Aargauische Kantonalbank



«The program CIIA allowed me to acquire comprehensive knowledge in a relatively short time. The lecturers ensured the necessary practical orientation, thereby completing the learning in self-study. In addition, the classroom teaching provided me with the opportunity to discuss financial market topics and issues related to the program with the other students and to build up a network of personal contacts which still proves very valuable to me. »

Désirée Häfliger, Credit Suisse



«The CIIA program gave me the opportunity to complete a demanding, first-class and renowned training program in the financial sector. It is ideally suited to complement a university education and opens new job opportunities. The program as well as the study material are well organized and structured. The combination of self-study and a practice-oriented classroom teaching requires discipline, but brings also significant added value. In addition, both the classroom training and study groups open up opportunities to expand the personal network. »

Roman Ludäscher, St. Galler Kantonalbank

Who do our graduates work for?

Aargauische Kantonalbank ■ ABB ■ ABN AMRO ■ AIG ■ Allianz Suisse ■ Avaloq ■ AXA Winterthur ■ Bank CIC ■ Bank Coop ■ Bank J. Safra Sarasin ■ Bank Julius Bär ■ Bank Leumi ■ Bank Lombard Odier & Cie ■ Bank Syz & Co ■ Bank Vontobel ■ Barclays Bank ■ Basellandschaftliche Kantonalbank ■ Basler Kantonalbank ■ Basler Versicherungen ■ Berner Kantonalbank ■ BMPI ■ BNP Paribas ■ BSI ■ BZ Bank ■ Centro di Studi Bancari ■ Citibank ■ Commerzbank ■ Cornèr Banca ■ Coutts & Co ■ Crédit Agricole ■ Credit Suisse ■ Deutsche Bank ■ Dreyfus Söhne & Cie ■ DZ Privatbank ■ EFG Bank ■ Eidg. Bankenkommission ■ Eidg. Finanzdepartement ■ Ernst & Young ■ Falcon Private Bank ■ Freiburger Kantonalbank ■ GE Money Bank ■ Generali ■ Genfer Kantonalbank ■ Goldman Sachs ■ Graubündner Kantonalbank ■ Groupe Mutuel ■ Helvetia ■ Holcim ■ Hottinger & Cie ■ HSBC ■ JP Morgan ■ Jyske Bank ■ KBL ■ KPMG ■ LGT Bank in Liechtenstein ■ Liechtensteinische Landesbank ■ Luzerner Kantonalbank ■ McKinsey ■ Migros Bank ■ Milesi Asset Management ■ Mirabaud & Cie ■ Mizuho Bank ■ Morgan Stanley ■ Neue Aargauer Bank ■ Nordea ■ Notenstein Private Bank ■ Pensionskasse SBB ■ Pictet & Cie ■ Pricewaterhouse Coopers ■ Privatbank Edmond de Rothschild ■ Rahn & Bodmer ■ Raiffeisen ■ Royal Bank of Canada ■ Saxo Bank ■ Schaffhauser Kantonalbank ■ Schroder & Co. ■ Schweizerische Mobiliar Versicherungs-gesellschaft ■ Schweizerische Nationalbank ■ Schweizerische National Versicherung ■ Schwyzer Kantonalbank ■ SIX Swiss Exchange ■ St. Galler Kantonalbank ■ Swisscanto ■ Swiss & Global Asset Management ■ Swiss Life ■ Swissquote Bank ■ Swiss Re ■ Thomson Reuters ■ Thurgauer Kantonalbank ■ UBS ■ Union Bancaire Privée ■ Urner Kantonalbank ■ Valiant Bank ■ Vaudoise ■ Visana ■ VP Bank ■ VZ Vermögenszentrum ■ Waadtländer Kantonalbank ■ Walliser Kantonalbank ■ Zuger Kantonalbank ■ Zürcher Kantonalbank ■ Zurich Financial Services

Lecturers of the AZEK study programs

Albisetti Alessandro, Banque Pictet
Altorfer Christian, responsAbility Investments
Dr. Beiner Nicole, NB RiskControl
Berclaz Geneviève, BE&C - Berclaz Ethics & Compliance
Prof. Dr. Berrada Tony, Université de Genève
Me Bétrisey Frédéric, Bär & Karrer
Dr. Biedermann Dominique
Bion Jérôme, Banque Lombard Odier
Dr. Blanco José Antonio, Swiss Life
Bonnaz Thierry
Braun Johanna, Universität Zürich
Braunschweig Stefan, Credit Suisse
Brügger Fabien, Banque Cantonale Vaudoise
Prof. Dr. Chaieb Ines, Université de Genève
Prof. Costanzo Antonio Gabriele, Centro di Studi Bancari
Dr. Courvoisier Matthias, Baker & McKenzie
de Rosa Salvatore, Eri Bancaire
Dr. Donegani Michel, Prisminvest
Prof. Dr. Dumont Pierre-André
RA Dürst Jennifer, Staiger Rechtsanwälte
Fasler Claude, Banque Lombard Odier
Fischer Philipp, OBERSON ABELS SA
Frei Pascal, PPCmetrics
Fusetti Alfredo, PPCmetrics
Prof. Dr. Gaspardo Nello
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Prof. Dr. Hens Thorsten, Universität Zürich
Prof. Dr. Hoesli Martin, Université de Genève
Hofer Stéphane, inCompliance SA
Dr. Illmer Stefan, Illmer Investment Performance Consulting
Dr. Jacobs Andreas, AZEK
Jaeger Daniel, BRP Bizzozero & Partners
Prof. Dr. Kaas Leo, Goethe Universität Frankfurt
Kanaah Abdul, Etude de Mes Jeandin & Defacqz
Klein Fritz Thomas
Dr. iur. Kratz-Ulmer Aline, Hubatka Müller Vetter Rechtsanwälte

Kurath Roland, Merkpunkt
Kurmman Benjamin, BRP Bizzozero & Partners
Lacraz Thierry, Banque Pictet
Lattmann Laurent, Tax Partner
Lawson Tom, Tax Partner
Dr. Lhabitant François-Serge, Kedge Capital
Dr. Liechti Diego, Nest Sammelstiftung
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Dr. Maraia Jean-Frédéric, Schellenberg Wittmer
Mentha Yvar, BRP Bizzozero & Partners
Me Merhai Joseph, BianchiSchwald SARL
Métral Olivier, Credit Suisse
Moulet Nicolas, Cité Gestion
Dr. Nicolodi René, Zürcher Kantonalbank
Prof. Dr. Olarreaga Marcelo, Université de Genève
Orelli Stefano, SUPSI
Prof. Dr. Passardi Marco, Institut für Finanzdienstleistungen
Zug IFZ, Hochschule Luzern
Pedrini Maurizio, Zürcher Kantonalbank
Dr. Perrin Julien, LPPV avocats
Dr. Puhan Tatjana Xenia, TOBAM
Prof. Dr. Raffournier Bernard, Université de Genève
Prof. Dr. Scognamiglio Donato, IAZI
Prof. Dr. Sieber René, Université de Genève
Stahl Eric, Banque Lombard Odier
Stiffler Paul, Swisscom (Schweiz) AG
Dr. Tuchschnid Nils, Haute école de gestion Fribourg
Prof. Dr. Valta Philip, Universität Bern
Vialis Nicolas, Trillium
Dr. Vlcek Martin, Banque Cantonale Vaudoise
Dr. von Ah Roman, Swiss Rock Asset Management
von Burg Ueli, Zürcher Kantonalbank
von Türk Myers Claudia, Banque Lombard Odier
RA Wiesendanger Désirée, Staiger Rechtsanwälte
Dr. Wilding Benjamin, Universität Zürich
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