

Certification "Certified Wealth Management Advisor" (CWMA)

The standard certification for Wealth Manager in Switzerland

 CERTIFICATION Certification body The Swiss Association for Quality SAQ Recommended by the Swiss Banker Association Fulfil the Swiss legislation requirements regarding the rule of conducts and client protection 	EXAMINATION Official exam provider • Self-study material • In five languages (F/E/D/S/I) • SAQ Body of knowledge: - Financial markets - Products & services - Wealth planning - Risk, legal & compliance - Advisory & sales	 EDUCATION Trainings & coaching Technical trainings Preparation to the oral exams Based on SAQ body of knowledge In three languages (F/E/D) Online or classroom The prices below are per participant and training			
Certification Fee CHF 225/pers. Costs charges by Fitch Learning	FitchLearning Attractive quote on demand	sofehonds½ day trainingsCHF380Full day trainingsCHF680on all trainingsPackage five ½ daysCHF1'650for members of the AGP-GCompany rates on demandof the AGP-G			
INFORMATION ON <u>www.saq.ch</u>	QUOTE & REGISTRATION cwma.support@fitchlearning.ch	AVAILABLE TRAININGS & REGISTRATION www.safehands.ch			

The certification must be revalidated every three years through 24-hours of continuous professional development measures

Do you need advice or do you have further questions ? Consult our web page at www.safehands.ch or contact us at info@safehands.ch

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Safe Hands GmbH

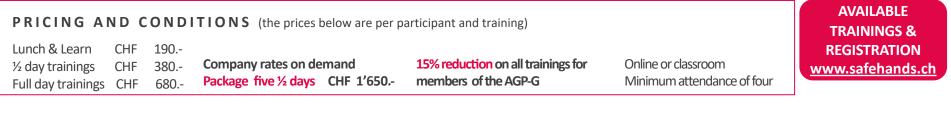
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expertise in banking

Continuous professional development – increased competences and trust Trainings accredited by SAQ as CWMA re-certification measures

Technical trainings	Objectives ¹		Duration		Objectives ¹		Duration
Technical trainings	Certif.	Recertif.	Duration	Advice and sales trainings	Certif.	Recertif.	Duration
Portfolio Management	\checkmark	\checkmark	2 x ½ days	Preparation for the Oral Examination	\checkmark		1 day
Behavioral Finance	\checkmark	\checkmark	½ day	Convincing value proposition		\checkmark	2 hours
Currencies	\checkmark	\checkmark	½ day	Asking the right question at the right time		\checkmark	2 hours
Derivative Products	\checkmark	\checkmark	½ day	Can you listen well ? (active listening)		\checkmark	2 hours
Structured Products	\checkmark	\checkmark	½ day	Storytelling		\checkmark	½ day
Credit Solutions – global and lombard	\checkmark	\checkmark	½ day	How do you manage objections ?		\checkmark	½ day
Mortgage Loans (in Switzerland)	\checkmark	\checkmark	½ day	Negotiation Techniques		\checkmark	½ day
Wealth Planning – Swiss Inheritance law	\checkmark	\checkmark	½ day	Sale impact on the phone		\checkmark	2 hours
Wealth Planning – Swiss pension system	\checkmark	\checkmark	½ day	Referrals – when and how ?		\checkmark	2 hours
Risk management	\checkmark	\checkmark	½ day	The first meeting – dos and don'ts		\checkmark	2 hours
Company valuation	\checkmark	\checkmark	½ day	$^{_{1}}\checkmark$ Main objective / \checkmark accredited for recertification			



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