

## 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



Personnel  
Certification

Certification Fee CHF 225/pers.  
Costs charges by Fitch Learning

INFORMATION ON [www.saq.ch](http://www.saq.ch)

### 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

FitchLearning

Attractive quote on demand

#### QUOTE & REGISTRATION

[cwma.support@fitchlearning.ch](mailto:cwma.support@fitchlearning.ch)

### 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

**safehands**

½ day trainings	CHF	380.-	<b>15% reduction on all trainings for members of the AGP-G</b>
Full day trainings	CHF	680.-	
<b>Package five ½ days</b>	CHF	<b>1'650.-</b>	
Company rates on demand			

#### AVAILABLE TRAININGS & REGISTRATION

[www.safehands.ch](http://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](http://www.safehands.ch) or contact us at [info@safehands.ch](mailto:info@safehands.ch)

## Continuous professional development – increased competences and trust

### Trainings accredited by SAQ as CWMA re-certification measures

Technical trainings	Objectives <sup>1</sup>		Duration
	Certif.	Recertif.	
Portfolio Management	✓	✓	2 x ½ days
Behavioral Finance	✓	✓	½ day
Currencies	✓	✓	½ day
Derivative Products	✓	✓	½ day
Structured Products	✓	✓	½ day
Credit Solutions – global and lombard	✓	✓	½ day
Mortgage Loans (in Switzerland)	✓	✓	½ day
Wealth Planning – Swiss Inheritance law	✓	✓	½ day
Wealth Planning – Swiss pension system	✓	✓	½ day
Risk management	✓	✓	½ day
Company valuation	✓	✓	½ day

Advice and sales trainings	Objectives <sup>1</sup>		Duration
	Certif.	Recertif.	
Preparation for the Oral Examination	✓		1 day
Convincing value proposition		✓	2 hours
Asking the right question at the right time		✓	2 hours
Can you listen well ? (active listening)		✓	2 hours
Storytelling		✓	½ day
How do you manage objections ?		✓	½ day
Negotiation Techniques		✓	½ day
Sale impact on the phone		✓	2 hours
Referrals – when and how ?		✓	2 hours
The first meeting – dos and don'ts		✓	2 hours

<sup>1</sup> ✓ Main objective / ✓ accredited for recertification

#### PRICING AND CONDITIONS (the prices below are per participant and training)

Lunch & Learn	CHF	190.-
½ day trainings	CHF	380.-
Full day trainings	CHF	680.-

**Company rates on demand**  
**Package five ½ days CHF 1'650.-**

**15% reduction on all trainings for members of the AGP-G**

Online or classroom  
Minimum attendance of four

**AVAILABLE  
TRAININGS &  
REGISTRATION**  
[www.safehands.ch](http://www.safehands.ch)