

# SFI Spotlight Course

## Asset Management Organization and Distribution



Swiss Finance Institute International Offerings  
Spotlight Course  
Asset Management  
Organization and Distribution

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<b>Dates</b>	<b>Topics Morning Session</b>	<b>Topics Afternoon Session</b>
28.08.2017	Risk Management at AM Firms	Performance Reporting
29.08.2017	Change Management (I)	Change Management (II)
30.08.2017	Client Delight (I)	Client Delight (II)
31.08.2017	Future Distribution Models for AM Firms	Fiduciary Responsibility & Governance

**Registration deadline:** July 31, 2017

Subject to change.



**Objectives**

Asset management is currently undergoing enormous changes. Not only what we do is changing, but how we do it as well. This Spotlight Course focuses on change management in both areas people and processes, client delight, performance reporting, fiduciary responsibility, risk management as well as future distribution models of asset management.

**Target Audience and Admission**

This course is targets experienced executives in asset management, which have

- Significant practical experience
- Proven analytical skills
- Strong English skills to follow the course and actively participate in the in course discussion

The number of participants for this Spotlight Course is limited. The program management decides on the final admission of candidates.

**Course Structure**

The SFI Spotlight Course “Asset Management Organization and Distribution” consists of 4-days of classroom training. While participants acquire fundamental knowledge in a self-study phase before the classroom training, during the course selected lecturers with close contact to the industry review first the status quo of the specific topic, both in regard to academic research and practice, and then move into current challenges.

**Certification**

On completion of the program, participants will receive a certificated issued by Swiss Finance Institute. A subsequent crediting of ECTS-points to the "CAS in Banking with a focus on Asset Management" is excluded.

**Dates and Fees**

The next SFI Spotlight Course “Strategic Challenges in Asset Management” takes place from August 28 – 31, 2017. The course will take place in Zurich.

The course fee is CHF 4'900.-- (incl. VAT). The fee covers tuition, course materials, lunches and refreshments. It does not include evening meals, hotel, or travel expenses.

**Further Information**

Tel. +41 (0)44 254 30 80, [education@sfi.ch](mailto:education@sfi.ch)

[www.sfi.ch/amorg](http://www.sfi.ch/amorg)

## **Swiss Finance Institute**

Created in 2006 by the Swiss banks, the Swiss Stock Exchange, six leading Swiss Universities and the Swiss Federal government, the Swiss Finance Institute is a unique undertaking merging the experiences of a centuries old financial center with the innovative drive of a frontier research institution. Its goal is to change the research and teaching landscape in areas relevant to banks and financial institutions.

With more than 50 full time professors and ca. 80 PhD students, the Swiss Finance Institute represents the premier concentration of expertise in banking and finance across the European continent. The Institute's close affiliation with the Swiss banking industry ensures that its research culture remains in tune with the needs of financial services sector. Networking events where the participants can meet with local practitioners are therefore also an essential part of the offering.