

# 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>
27.08.2018	Risk Management at AM Firms	Performance Reporting
28.08.2018	Change Management (I)	Change Management (II)
29.08.2018	Client Delight (I)	Client Delight (II)
30.08.2018	Client Services + Blockchain Solutions for AM Firms (I)	Client Services + Blockchain Solutions for AM Firms (II)

**Registration deadline:** July 27, 2018  
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 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 certificate 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 «Asset Management Organization and Distribution» takes place from August 27 – 30, 2018. 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**

Swiss Finance Institute (SFI) is the national center for fundamental research, doctoral training, knowledge exchange, and continuing education in the fields of banking and finance. SFI's mission is to grow knowledge capital for the Swiss financial marketplace. Created in 2006 as a public-private partnership, SFI is a common initiative of the Swiss finance industry, leading Swiss universities, and the Swiss Confederation.