

From the industry for the industry: Certification of Bank Client Advisors

By



Leading industry educators Swiss Finance Institute, the University of Zurich, and CYP Association jointly launch an inclusive training offering—available in four languages—to prepare individuals for certification as client advisors by the Swiss Association for Quality (SAQ) under ISO standard 17024. This unique collaboration allows the offering to address the different client advisory roles in retail and corporate banking and in wealth management on the Swiss Banking School – Certification Portal.

The entire learning approach is completely modularized and need-based along the assessed knowledge gaps. For banks, this provides numerous opportunities to add company-specific training modules and components delivered via the same online learning portal. Customized programs for firms are designed in our joint digital training house.

The offering builds on the latest learning methodologies and platforms, allowing customers to choose their ease-of-use devices while delivering a well-controlled learning environment. Depending on learning gaps and preferences, users can select and combine digital and classroom settings. The reporting of progress and achievements respects the requirements both of the offering institutes and of the appropriate regulatory authorities.

It is also possible for banks to add individual modules and provide customized training courses, such as cross-border courses in wealth management. Participants in our program can earn credits (ECTS) that are transferable to further education programs, such as the Certificate of Advanced Studies (CAS) in Wealth Management offered by the University of Zurich.

With more than 90 years of combined experience of educating the professionals of the Swiss finance industry, the offering institutes have an unmatched track record of excellence and experience. The courses exist in German, French, Italian, or English and will be available with open enrolment dates as of third quarter 2016.

For further information please contact:

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Alexia Böniger, Chief Executive Officer, CYP Association: *Scaling the operations in a client focused way, this unique collaboration allows us to address the different client segments in banking with state-of-the-art training platforms and digital devices, and competitive pricing.*

Dr. Gabriela Maria Payer, Head of Education and Member of the Management Board, Swiss Finance Institute: *Our institutes combine both faculty and knowledge from academia and the industry, developing young and more senior talents thanks to our unmatched track record of excellence and experience.*

Prof. Dr. Thorsten Hens, Director of the Department of Banking and Finance, University of Zurich: *The three key banking educators owned by the private and public Swiss banking industry jointly offer an inclusive training and examination with a trusted governance, excellent quality, and seamless integration.*