

EFPA European Financial Advisor®

Factsheet

Full (comprehensive) practice of financial advice. Refers to professionals who offer a rigorous service of assessing client needs and developing financial solutions, particularly concerning investments at portfolio level, but also including basic insurance/retirement /credit/financing solutions.

Target audience:

Refers to professionals offering a service of assessing client needs and developing financial solutions in wealth management.

Admission:

EFPA European Investment Practitioner®, academic diploma or 3 years of professional experience.

Format:

Different format available following our training center partners:

- Distance-learning through video-conferences with experts. The learning platform contains also course materials and records of the video-conferences if needed.
- Classic learning, in class with experts.

Languages:

Courses are provided in English. French under development.
Examination: English.

Beginning of classes:

2 sessions available per year (depending of the training center partners) starting in September and February.

Duration:

10 classroom days or 80 tuition hours (or equivalent).

Objectives:

Acquire a perfect mastery of the tools necessary for the exercise of the investment advisor role.

Content:

- Economic Environment (level II): 8 hours
- Financial Markets (level II): 4 hours
- Investment Products (level II): 12 hours
- Assessing Client Needs (level II): 12 hours
- Portfolio Construction (level II): 12 hours
- Insurance Products (level II): 8 hours
- Retirement advice (Level II): 4 hours
- Credit (Level II): 8 hours
- Real Estate Investing (Level I): 4 hours
- Regulation and Ethics (level II): 8 hours

Final examination:

Format: 2 written exams (multiple choice questionnaire and practical cases).
Available date: February and July

Certification:

Certified **EFPA European Financial Advisor®**.
Certification recognized by the CSSF and other regulators across Europe.

Cost:

Courses: Depend on training centers
Final Examination: 650€.

Contact:

See below