EFPA European Investment Practitioner®

Factsheet

Certification designed to meet the requirements set by art. 18 of the ESMA Guidelines on knowledge and competences for staff giving investment advice. The training program should be covered in a minimum of 10 classroom days or 80 tuition hours (or equivalent).

Target audience:
The program is aimed at investment practitioners who wish to comply with ESMA guidelines in terms of knowledge and competencies.

Admission:
Academic diploma (Master, Bachelor or equivalent) or 3 years of professional experience.

Format:
Different format available following our training center partners:
- Distance-learning through video-conferences with expert. The learning platform contains also course materials and records of the video-conferences if needed.
- Classic learning in class with expert.

Languages:
Course are provided in English. French under development.
Examination: English.

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

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

Content:

- Economic Environment (level I):	8 hours
- Financial Markets (level I):	4 hours
- Investment Products (level I):	36 hours
- Assessing Client Needs (level I):	4 hours
- Portfolio Construction (level I):	12 hours
- Insurance & Retirement (level I):	8 hours
- Regulation and Ethics (level I):	8 hours

Examination:
Format: written exam (multiple choice question).
Date available: February and July

Certification:
Certified **EFPA European Investment Practitioner®**.
Certification recognized by the CSSF and other regulators across Europe.

Cost:
Courses: Depend on training centers.
Final Examination: 500€.

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