

EFPA European Investment Assistant®

Factsheet

Certification designed to meet the requirements set by art. 17 of the ESMA Guidelines on knowledge and competences for staff giving information about investment products, investment services or ancillary services. The training program should be covered in a minimum of 7,5 classroom days or 60 tuition hours (or equivalent).

Target audience:

Refers to professionals giving information about investment products, investment services or ancillary services.

Admission:

No prerequisites.

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 experts.

Languages:

Course are provided in English. French under development.

Examination: English.

Beginning of classes:

3 sessions available per year (depending of the training center partners) starting in January, April and September.

Duration:

7,5 classroom days or 60 tuition hours (or equivalent).

Objectives:

Acquire a solid knowledge base to enter the financial sector.

Content:

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|-------------------------|----------|
| - Economic Environment: | 8 hours |
| - Financial Markets: | 8 hours |
| - Investment Products: | 36 hours |
| - Regulation: | 8 hours |

Final examination:

Format: Multiple choice question.

Available date: March, June and December

Certification:

Certified **EFPA European Investment Assistant®**.

Certification recognized by different regulators across Europe.

Cost:

Courses: Depend on training centers

Final Examination: 500€.

Contact:

See below