Certified Wealth Management Advisor (CMWA)
Technical Skills Exam - Preparation and Coaching

What support is available and where can you find it?

For client facing employees, the Certified Wealth Management Advisor (CMWA) qualification is an important career step. It not only satisfies the professional requirements of the Swiss FIDLEG regulation, but also demonstrates your dedication to excel. As a preparation for the exam you need to start with your employer's self-learning material. If you have already worked through this material and you don't yet feel ready for the exam, we can arrange for the additional support listed below. Please discuss with your line manager before contacting us.

The following CMWA technical skill review and exam preparation are available

Classroom Training

2 days of interactive classroom training with an experienced trainer.

Structure:
For each topic, the trainer will provide a short review of the main concepts and then go into sample exam questions and discuss their solution with the class. Each participant will have to fill out a short questionnaire beforehand to ensure that the time is spend on topics and questions most relevant to you.

Duration / Class size:
2 days in groups up to 20 participants

Who is it for:
You have already worked through the UBS study notes but have remaining questions and need a little support to bring everything together. Or maybe, you just want to fast track your learning.

Costs:
8000 CHF & VAT
(per 2-day course, up to 20 participant)

Blended Coaching

Individual support blending e-learning and in person session with your coach

Structure:
Meet your coach for a general assessment. Set the focus and the pace that suits you best. Review each topic using short e-learning modules and sample exercises, then meet with your coach in-person to clarify open questions.

Duration / Size:
Spread over 10 days, including an initial meeting and 4 hours in-person working sessions.

Who is it for:
You have already worked through the UBS study notes but need more individual and tailored help. Maybe you are new to finance, or exams make you nervous, or you missed your first test attempt.

Costs:
2600 CHF per person & VAT

Individual Coaching

Your individual coach, your preferences. You decide

Structure:
Following an initial discussion, your coach will make a suggestion, but you decide on the structure. Regular individual review meetings over lunch? Maybe combined with e-learning? Or you like to work on sample questions and then discuss them over the phone? Skype training? All good!

Duration / Size:
You decide on the pace that suits you best. One on one with your coach.

Who is it for:
We have helped people who just had one final attempt to pass the test, others who felt pressured by exams and yet others who were just too busy and needed a flexible coach at their side.

Costs:
As pre-agreed or billed by the hour

Topics covered

Asset Classes: Equity, Fixed Income, Alternatives
Financial Markets, FX & Economics
Derivatives & Structured Products
Portfolio Management & Behavioral Finance

Meet your coaches

Walter Brägger, Ph.D.

22 years of financial market & training experience

Walter is an experienced financial trainer and helped many bankers and investor to understand finance. His energy and his capacity to explain complex financial concepts in simple terms, are key in making finance come alive. Before founding NoscoPartners, Walter was Managing Director and Global Head of the Finance & Risk faculty within the UBS Business University, working out of Zurich and London. He is a recognized expert in developing and delivering financial training programs and has done so for numerous clients around the globe. His expertise covers cash and derivative products across all major capital markets as well as specific risk and investment topics.
Walter holds a Ph.D. in Mathematics from the University of Basel.

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Vincent Couson, CFA, CAIA

20 years of investment, advisory and banking experience

Vincent has already helped many Client Relationship managers pass the CMWA exam, be it through engaged CMWA preparation classes or through tireless individual coaching. Before founding NoscoPartners, Vincent was a Senior Member of the UBS Strategic Investment Advisory team developing tailored investment solutions for institutional clients around the globe. Prior to that he worked for UBS Asset Management in Zurich, Chicago and London as a portfolio manager for structured funds, member of the asset allocation & risk team as well as alternative investment specialist. His expertise includes topics such as portfolio construction & analysis, asset & risk management as well as derivatives and structured products.
Vincent holds a Master in finance & business administration from the University of Zurich. He is a Chartered Financial Analyst (CFA) as well a Chartered Alternative Investment Analyst (CAIA).

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"Great course, great teachers!
First time in a long time that I am attending a course where complex and theoretical concepts are expressed in an easily understandable way, lively, with practical example that will make me remember them beyond the test. "