



E-Learning Suite Fit for FinSA

In light of the introduction of FinSA and FinIA, financial service providers and their employees face new challenges. Targeted profiling and categorisation of clients, advice appropriate to the specific situation and comprehensive documentation are core requirements demanded by the legislator.

The modular, interactive e-learning suite „Fit for FinSA“ from Fintelligence, IMC and Primecoach prepares your client advisors and other employees for the increasing regulatory requirements. Simulation tests and a final self test will certify the learning success.

The e-learning suite „Fit for FinSA“ is recognised by SAQ as a recertification measure within the scope of client advisor certification at banks.



Your benefit

- Your client advisors and other employees are introduced to the extended regulatory requirements in an intuitive, effective and targeted manner.
- The modular structure enables learning on the job and takes the different know-how levels of the employees into account. The modules are attractively designed and include manifold interactions, examples and client scenarios. Participants learn independently of time and place.
- Online tests ensure that participants have understood and internalized the content.
- The product landscape and internal instructions of your bank may be incorporated into the modules. Further adaptations to your specific circumstances are possible.



Our offer

- Modular, multimedia e-learning with simulation and final self test.
- Available in German, French, Italian and English.
- Attractively structured with diverse interactions, case studies, scenarios and links.
- Meaningful learning progress checks for the participant and reliable reporting for the bank.
- Ready for IMC's Learning Management System and other Learning Management Systems. The modules can be run on PCs, tablets and smartphones.

The contents

- Aim, purpose and applicability of FinSA
- Client segmentation and profiling (incl. opting-in and opting-out)
- Appropriateness and suitability test
- Obligations to inform the client (ex-ante, ex-post)
- Accountability, logging and record-keeping obligations
- Comparisons to MIFID II

The Partners

Fintelligence

Fintelligence offers tailor-made and personalized services in personnel and organizational development for financial services providers. In particular, Fintelligence is focussed on offering development measures and trainings for client advisors in banking. Fintelligence is accredited by Swiss SAQ (Swiss Association for Quality – division of SECO) for client advisor certifications (all programs).

Fintelligence

IMC

IMC is the leading full-service provider of digital training. Experts in training strategy, learning technologies and e-learning content work hand in hand to provide holistic and customized e-learning solutions. IMC was founded as a spin-off of Saarland University and supports companies in the planning and implementation of professional digital training strategies.

imc.

Primecoach

Primecoach offers management consulting in operational and strategic issues, especially in the area of Legal & Regulatory Services for the financial industry. Within this area, Primecoach offers a full range of regulatory and supervisory services, including FinSA and FinIA, also taking MiFID into account.

