



## ISO Client Advisor Certification in accordance with SAQ

The financial industry is undergoing a rapid change, which is constantly imposing increasing demands on bank employees? Do you as a client advisor want to stay abreast in banking and financial markets and want to have this testified by a certificate?

Fintelligence offers you a wide range of banking topics to prepare you for the certification exam in a process customized to your specific needs.

As a result, you can achieve the 'bank client advisor' certification efficiently and reliably.



### Key Facts

- The certificate 'bank client advisor' attests that you as a practitioner possess in-depth know-how in banking, extensive knowledge regarding financial products, and outstanding consulting skills, all of which enable you to offer excellent advice to your clients.
- You get an attractive certificate in your specific client segment, for example in Wealth Management, Retail Banking or Commercial Banking; this lays a solid foundation for your credibility and for building trust with your clients.
- The certification requirements ensure high quality standards. The certificate 'bank client advisor' is in line with the international ISO standards (ISO 17024) for certification of persons, and is recognized by the Swiss Accreditation Service SAS and by SECO.

## Which certifications do we offer?

Fintelligence offers you training and certification programs tailored to your specific client advisor role:



## Components

- You attend class-room courses to further develop your communication and dialogue skills.
- You attend specialized tutorials or training sessions that are offered on various banking-related topics.
- In addition, the comprehensive, interactive Banking & Finance and Bank Compliance library of Fintelligence is at your disposal. The online platform includes all relevant content and various simulation tests.
- At the end of this process you can acquire the certificate of your target client segment by completing a written and oral exam (in accordance with SAQ standards).

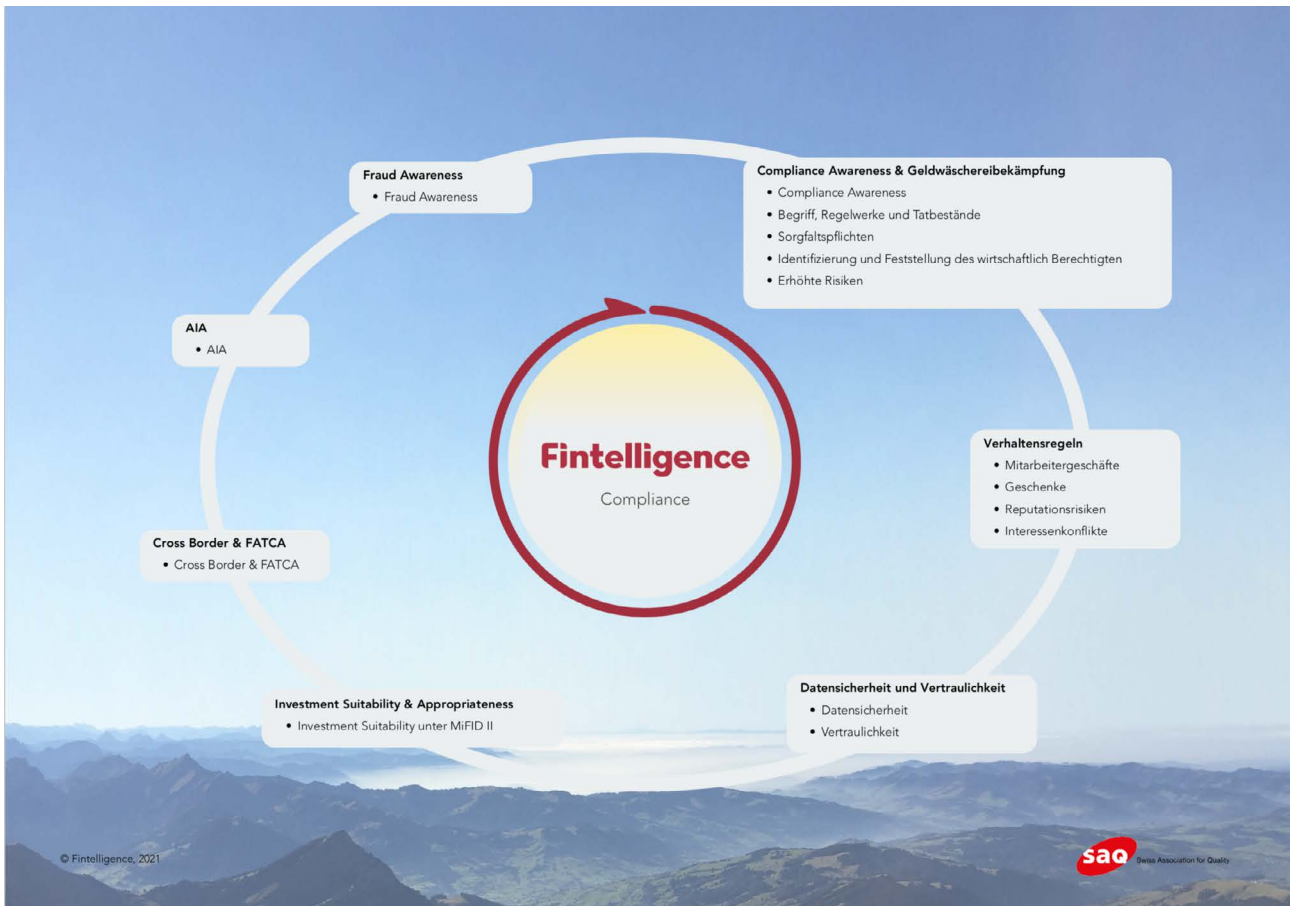
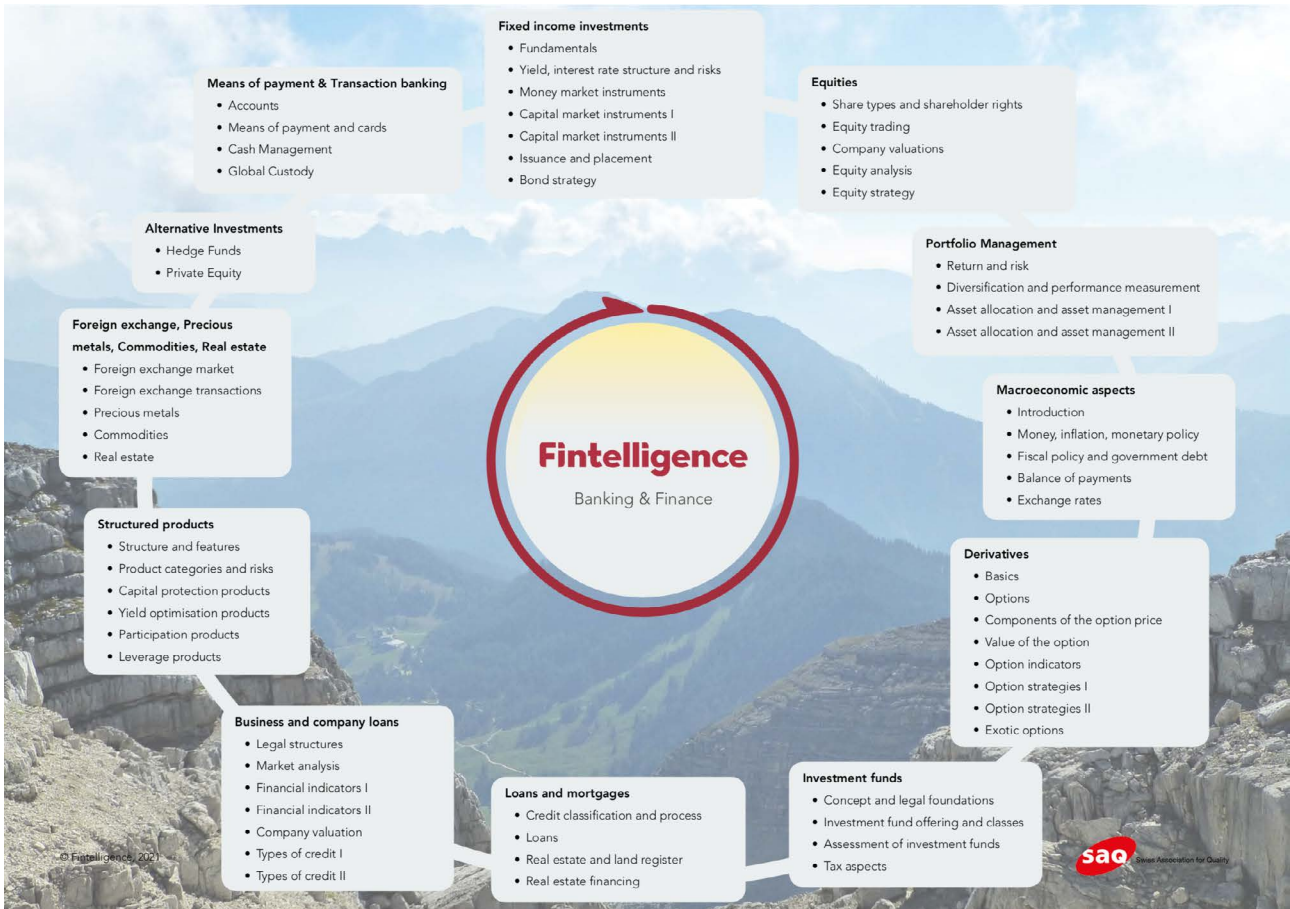
## Under what conditions are you allowed to participate in the certification program?

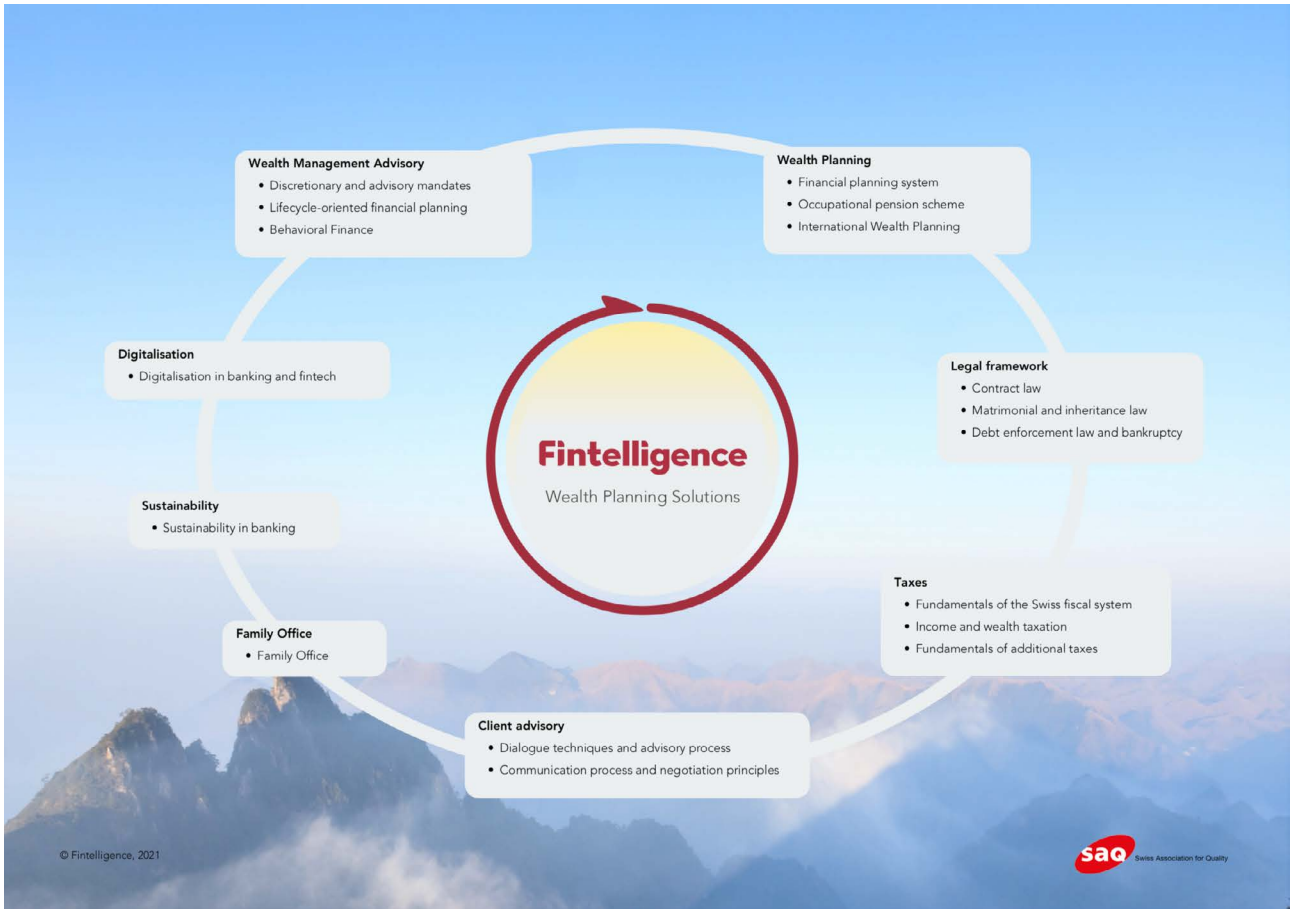
You qualify to participate in the certification examination, if either at the time of registration or of examination:

1. You are employed by a financial institution;
2. You are responsible for a client book (i.e. you are providing advice to clients), or you are a specialist in direct contact with clients;
3. You are supported by your employer (a financial institution).

The examination consists of a written and an oral part. Prerequisite for participating in the oral test is the successful completion of the required written test(s).

## Fintelligence E-Learning and E-Testing Suite





## About Fintelligence

Fintelligence offers tailor-made and personalized services in personal 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 a registered stock corporation under Swiss law. It is headquartered in Zug, Switzerland.