Fintelligence

SAM training course offers training opportunities for independent asset managers

We offer you attractive e-learning and e-testing courses that you can complete independent of time and place. This course allows you to obtain the credits you need in the context of the SAM training course quickly and in a focused manner.

As a member of SAM and independent asset manager, SAM requires you to obtain 38 training credits every two years to extend the certificate period and thus continue to be allowed to bear the title 'Qualified Independent Asset Manager SAM'.

Below you will find our training programmes accredited by SAM, which include topics relating to banking and finance, law, tax law, and compliance.

Your benefits

- You obtain the credits you need to extend the certificate period quickly and in a focused manner.
- The modular structure enables on-the-job learning, at any time and anywhere. The modules are engaging and include various interactive elements, web links, examples, and client scenarios.
- Online self-tests ensure that you have understood and mastered the content.
- All trainings are available in German, French, English, and Italian.

More information and order form

- For more information about individual SAM training programmes, please visit our website.
- Buy your SAM training programme directly via our online booking form to gain quick access to our learning platform.

Please note: You must already be registered as an independent financial advisor when you take part in the course to earn credits for SAM training programmes.

Content	Credits
Portfolio management – Return and risk, diversification and performance measurement, asset allocation and asset management	6
Derivatives I – Options, components of the option price and value of the option	6
Derivatives II – Option indicators, option strategies and exotic options	6
Investment funds - Concept and legal foundations, Investment fund offering and classes, assessment of investment funds and tax aspects	4.5
Structured products I – Structure, features, product categories and risks	4
Structured products II – Capital protection, yield optimization, participation and leverage products	6
Foreign exchange, precious metals, commodities, real estate	5.5
Alternative investments - Hedge funds and private equity	3
Wealth management advisory – Discretionary and advisory mandates, lifecycle-oriented financial planning and behavioral finance	4
Taxes – Fundamentals of the Swiss fiscal system, income and wealth taxation, additional taxes	3.5
Internal codes of conduct – Employee transactions, gifts, reputation risks, conflicts of interest	3
Data security and confidentiality	2
Investment suitability & appropriateness under MiFID II	2
Derivatives I & Structured products I	10
Derivatives II & Structured products II	12
Investement funds & Portfolio management	10.5
Foreign exchange, precious metals, commodities, real estate & Alternative investments	8.5
Internal codes of conduct & Data security and confidentiality	5.5
Digitalisation in Banking and Fintech	2
Sustainability in Banking	2
Family Offices: Structure, governance, and staffing	2
ESG – Introduction and background, investments, lending, regulations and guidelines, analysis and data, Stewardship und Engagement	6

About Fintelligence

Fintelligence provides tailor-made and personalized services in personnel and organizational development for financial services providers. In particular, Fintelligence focuses on offering development measures and training for client advisors, team leaders and middle and back office personnel of banks.

Fintelligence is accredited by SAQ (Swiss Association for Quality) for all six client advisor programs, by SAM (Swiss Association of Asset Managers), by CISI (Chartered Institute for Securities & Investment) in the United Kingdom and IBF (Institute of Banking and Finance) in Singapore.

Fintelligence is a registered stock corporation under Swiss law. It is headquartered in Zug, Switzerland. The company has offices in Zurich, London and Singapore.

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