

Partnership between SFAF and AIWM

Paris July 11, 2018

The French Society for Financial Analysts (SFAF) and the Association of International Wealth Management (AIWM) are pleased to announce their partnership to offer the Certified International Wealth Management (CIWM).

This “new” CIWM is an updated version and will be offered in blended learning training. This partnership will enable the French association to bring to its participants the highest international standards in Wealth Management whilst taking into account our French specificities in the training program.

“We think that the Wealth Management program will be of interest to young professionals wishing to widen their knowledge or to participants willing to gain access to this profession. The SFAF has already several projects of partnerships with Business Schools or Universities in France ready to offer the CIWM to their students”, says Sabine Topol, Head of Training.

Thierry Giami, SFAF’s President says: “In partnership with the AIWM, the SFAF reintroduces in France the « new » CIWM, a high level professional certification, international diploma, fully blended learning training. The modernization of training is pursued to offer the financial activities the means of adaptation and evolution. »

Andreas Jacobs, AIWM’s CEO adds “We are delighted with the cooperation with SFAF and bringing an established global standard of the highest quality to France. It further strengthens our world-wide network of countries offering the CIWM.”

The Certified International Wealth Manager CIWM® training program ensures an in-depth knowledge of international wealth management and tax planning that reflects the cross-border connections and investment of today’s wealth owners, teaches sophisticated techniques to assess a client’s overall financial situation and risks, and takes a holistic approach to a customer’s financial and personal situation (accounts, tax, cash flow, portfolio, real estate, family etc.) It also focuses on the psychological factors influencing the customer and the advisor (behavioural finance).

About SFAF

For more than 50 years, SFAF stands at the heart of Paris Financial Community.

The association represents around 1 500 members specialized in financial analysis and fund management active within a large range of securities, from equity to fixed income. The members are also active in the broader field of risk management and cover either public or private investment.

SFAF engages toward the enhancement of financial analysis standard for professionals through the activity of its working groups, offers professional designations (CIIA - Certified International Investment Analyst and CIWM) and lifelong education and promotes the development of quality financial information. SFAF also supports listed companies in the organization of their regular financial communication. It is represented at most of professional associations and authorities in Paris and advocates for a better framework for investment professionals. Internationally, the association is in contact with relevant international organizations and is a founding member of EFFAS and ACIIA. SFAF also edit the review ‘Analyse Financière’ and a monthly newsletter

See: www.sfaf.com & www.analysefinanciere.org