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FINSA – INITIAL TRAINING

Knowledge of the FinSA rules of conduct (Art. 6 FinSA)

E-learning

Client Advisors, notably financial advisors and financial products distributors, have to demonstrate that they have sufficient knowledge regarding the rules of conduct of FINSA (art. 6 FINSA).

In particular, Client Advisors who have applied for registration with a Swiss Register of Client Advisors without having demonstrated their knowledge of these rules must attend a FINSA training course recognised by ARIF.

Participants will be asked to connect online to a secured training platform.
Detailed instructions will follow to registrants. Individual email address is required.
The registration fee must be paid in full in advance.

Module 1 **Stéphanie Hodara El Bez**, Partner, ALTENBURGER LTD legal + tax, member of ARIF Committee

« Scope of FinSA and registration of client advisers »

Module 2 **Géraldine Badel Poitras**, Partner, Gillioz Dorsaz & Associés, and member of ARIF Committee

« Classification and rules of conduct »

Module 3 **Antoine Amiguet**, Partner, OBERSON ABELS SA

« Offering of financial instruments »

Quiz Evaluation test

Please note that the training session will be concluded by an online survey and certificates of participation will be sent by email to those having attended the training session and completed the online survey.

Registration fee : CHF 422.-/ pers. (VAT 8.1% included)

Please note that this certified training course is meant for Financial Service Providers and Client Advisors bound by the art. 6 FinSA and listed among accepted training in the field of FinSA rules of conduct.