

Cert. Know the FUNDamentals FA[©] Intermediate.

Target group, previous knowledge

- Know the FUNDamentals Intermediate (KtF Intermediate) is particularly suitable for career changers and those re-entering the world of collective investment schemes.
- Participants already have practical experience in the world of collective investment schemes.
- Know the FUNDamentals Intermediate offers participants the opportunity to deepen the knowledge of funds quickly and in a targeted manner for the requirements of professional activity.

Course description

- compact course, 3 days, including certificate examination
- current developments in the market environment and expansion of product knowledge Switzerland
- uniform terminology for professional exchange of participants
- broadening and deepening knowledge about collective investment schemes
- All important contexts and regulatory basics
- very practical with use of fact sheets and fund regulations, also linking knowledge with legal texts
- active exchange between lecturers and participants

Table of contents KtF Intermediate course

- Swiss market, fund classifications
- legal basics, introduction to product management, in-depth knowledge of licensees
- NAV Calculation, Forward Pricing, Pricing
- basics taxes and auditing Switzerland

Teaching and learning format

- Attunement: Reading, asking questions, preparing, individual to individual learning modules.
- Listening: Presentations (experts), sharing, translating content into own language.
- Individual as well as group work and presentations, Q&A
- Processing: Reading, asking questions and deepening

Course dates KtF Intermediate

- Webinar, course language English
- the course KtF E04/21 will be held on June 8/17/24, 2021
- The multiple choice test will be performed on June 24, 2021 by mail.

Costs

- Course KtF Intermediate: CHF 2'050, plus VAT.
- Test KtF Intermediate CHF 150, plus VAT.