



Personnel  
Certification

Swiss Association for Quality

## SAQ Personnel Certification Client Advisor Bank

The conditions under which bank advisors operate are changing rapidly: new trends, legislation, products and the demands of customers and the environment are in a state of constant flux. The common, industry-wide SAQ quality standard Client Advisor Bank takes all these factors into account. Adjustments and innovations are adapted on an ongoing basis. Together with the regular recertification requirements for the certified client advisors, the high-quality requirements are continuously met. Thanks to the accreditation of the certification according to ISO 17024 by the Swiss Accreditation Service SAS, SAQ Swiss Association for Quality offers a consistent, transparent and worldwide unique certification standard for the banking industry.

### Reasons for the success

#### Quality

- A certification standard of ISO 17024 accredited by the Swiss Accreditation Service SAS (SECO)
- Supported by the Swiss banking industry
- Recommended by the Swiss Bankers Association  
All certification programs are FIDLEG compliant
- CWMA complies with MIFID II guidelines
- High ESG standards thanks to cooperation with Swiss Sustainable Finance
- SAQ as a neutral, established & experienced center of excellence for personnel certification

#### Advantages

- Consistent quality standard
- Combination of professional experience, knowledge and skills
- Regular re-certification maintains a high level of knowledge and fosters lifelong learning
- 6 certification programs in 4 languages for the segments:
  - Retail
  - Corporate
  - Wealth Management
- Comparability and recognition within the banking industry
- Flexible and adaptable certification system
- Consistent quality and transparency

#### Facts & Figures

As of March 31, 2023

- Certified Client Advisor Bank since 2012
- Successfully certified advisors from over 85 banks of 8 banking groups and EAMs
- Almost 17'000 active certificates:
  - Advisor Private Clients: 2'141
  - Advisor Individual Clients: 4'487
  - Advisor SME Clients: 615
  - Corporate Banker (CCoB): 875
  - Advisor Affluent Clients: 348
  - CWMA: 8'330
- Exams in many countries with 1200 examination experts
- 8 mandated exam providers
- 55 external providers of recognized recertification measures

Certified  
Client Advisor SAQ

SwissBanking



#### Personnel Certification

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