



Personnel
Certification

Swiss Association for Quality

SAQ Personnel Certification Client Advisor Bank

The increase of customer's demands on consulting services as well as the continually changing situation on financial markets demand high competences in Client Advisors. A common industry-wide benchmark will create mutual recognition and enables a global exchange of personnel. This comparability demands consistent standards. As an established, neutral and governmentally accredited certification service to ISO 17024 SAQ Swiss Association for Quality with the certification program Client Advisor Bank offers an effective solution for the international banking industry.

Reasons for our success

Quality

- A certification standard of ISO 17024 accredited by the Swiss Accreditation Service SAS (SECO)
- Supported by the banking industry
- Recommended by the Swiss Bankers Association
- Pursuit of international recognition
- CWMA complies with MIFID II guidelines
- SAQ as a neutral, established and experienced center of excellence for person certification

Advantages

- Tested system: Certified Client Advisor Bank
- Combination of knowledge and skills
- 6 certification programs in 4 languages for the segments:
 - Retail
 - Corporate
 - Wealth Management
- Consistent standards
- Enabled comparability
- Flexible and adaptable system
- Consistent quality and transparency given at the award of certificates

Facts & Figures

As of November 23, 2020

- Certified Client Advisor Bank since 2012
- Successfully certified advisors from over 75 banks of 8 banking groups
- Holders of active certificates:

Advisor Private Clients:	1845
Advisor Individual Clients:	3787
Advisor SME Clients:	435
Corporate Banker (CCoB):	784
Advisor Affluent Clients:	289
CWMA:	7155
- Exams in 19 countries with 1200 examination experts
- 10 mandated examination institutes



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