

Valid for 2023.FS

<b>Module Name: International Wealth Management</b>	
Module Code	w.MA.XX.IWM.22HS
Module Description	Challenges for Swiss wealth managers have increased on many fronts. Most importantly, the industry is facing a number of uncertainties to which a final answer has not yet emerged. In this module, students will examine megatrends shaping the future of wealth management (e.g., digitization, investing with purpose, democratization, higher standards, and an increased tendency for clients to switch providers or exercise fee pressure). The module will highlight recent strategic moves by leading Swiss players and, based on those strategic moves, will derive general market trends and topics that may serve as "food for thought" for future wealth management leaders and strategists. In addition, the module will deep-dive into entrepreneurial wealth management and family office services as key future growth and value drivers. Lastly, the module will present and discuss an approach to developing winning strategies for wealth managers to succeed in the challenging environment that lies ahead.
Program and Specialization	§ Banking and Finance § Banking and Finance (PiE)
Legal Framework	Academic Regulations MSc in Banking and Finance dated 29.09.2011, Appendix to the Academic Regulations for the degree program in Banking and Finance, first adopted on 28.08.2012
Module Category	<b>Module Type:</b> Compulsory Elective
ECTS	3
Organizational Unit	W Institut für Wealth & Asset Management
Module Coordinator	Christoph Künzle (kunh)
Deputy Module Coordinator	Markus Braun (brau)
Prerequisite Knowledge	Basic banking and wealth management.
Contribution to Program Learning Goals (Affected by Module)	§ Professional Competence § Methodological Competence § Social Competence § Self-Competence
Contribution to Program Learning Objectives	Professional Competence § Knowing and Understanding Content of Theoretical and Practical Relevance § Apply, Analyze, and Synthesize Content of Theoretical and Practical Relevance § Evaluate Content of Theoretical and Practical Relevance Methodological Competence § Problem-Solving & Critical Thinking § Scientific Methodology § Work Methods, Techniques, and Procedures § Information Literacy § Creativity & Innovation Social Competence § Written Communication § Oral Communication § Teamwork & Conflict Management § Intercultural Insight & Ability to Change Perspective Self-Competence § Self-Management & Self-Reflection § Ethical & Social Responsibility § Learning & Change
Module Learning Objectives	Students... § broaden and deepen their professional and practical competencies in the field of international wealth management. § develop an understanding of key issues and potential scenarios facing the industry. § gain an insight into key wealth management services and future growth and value drivers. § are able to understand, discuss and challenge quantitative and qualitative industry insights and data. § are able to express themselves expertly in the subject area chosen. § are able to work in teams to develop strategies and solution approaches. § are able to reflect on wider ethical, social, and governance topics facing the industry.

Module Content	§ Quantitative industry data § Industry scenarios and potential implications § Megatrends shaping the industry § Recent strategic moves by key Swiss players § Entrepreneurial wealth management and family office services as key future growth and value drivers § Working in teams § Production and presentation of strategies and solution approaches		
Links to other modules	-		
Methods of Instruction	§ Lecture § Project Work	<b>Social Settings Used:</b> Group Work	
Digital Resources	§ Reader § Teaching Materials		
Type of Instruction	<b>Classroom Instruction</b>	<b>Guided Self-Study</b>	<b>Autonomous Self-Study</b>
Lecture	26 h	-	
Excercise	-	-	
Project Work	-	32 h	
Seminar	-	-	
<b>Total</b>	<b>26 h</b>	<b>32 h</b>	
Performance Assessment			
<b>End-of-module exam</b>	<b>Form</b>	<b>Length (min.)</b>	<b>Weighting</b>
-	-	-	-
<b>Permitted Resources</b>	-		
<b>Others</b>			
	<b>Assessment</b>	<b>Length (min.)</b>	<b>Weighting</b>
Talk/oral presentation	Grade	30	100.00 %
Students are not allowed to revise and resubmit performance assessment tasks.			
Classroom Attendance Requirement	Mandatory Attendance: 80%		
Language of Instruction/Examination	English		
Compulsory Reading	-		
Recommended Reading	-		
Comments	-		