Federation for EDucation in Europe
Fédération Européenne Des Ecoles

EUROPEAN BACHELOR'S
WEALTH MANAGEMENT, INSURANCE AND BANKING

Careers in the finance sector are as varied as its clients. Whether in the context of a consulting firm, an insurance company or a bank, clients seeking wealth management services require a special approach: highly knowledgeable, they expect personalised, expert advice from professionals possessing excellent people, sales and technical skills.

Numerous actors proposing services in the sector have chosen to strengthen or develop their strategy in order to meet the needs of these high-profile clients. Wealth management offers a wide range of opportunities, all with excellent career prospects.

CAREER DESTINATIONS

- Wealth Management Advisor
- Elite Private Client Advisor
- Wealth and Investment Advisor
- Independent Wealth Management Advisor
- Real Estate Advisor
- Pension Advisor

KEY SKILLS

- Develop and manage a client portfolio
- Manage an investment portfolio
- Provide clients with optimal legal, fiscal and financial advice, particularly as regards identifying and preventing legal risks
- Manage and optimise the development of property assets
- Use Internet-based IT tools to establish a services marketing plan
- Manage and optimally develop property assets
- Gain a global vision of an organisation's accounting and financial activity and conduct a wealth and financial assessment

Designed by experts and professionals in the field, the European Bachelor's in Wealth Management is an innovative, hands-on programme that provides students with the skills demanded by the contemporary financial sector.

Programme graduates acquire a range of commercial and technical skills needed for successful career growth.

EUROPEAN BACHELOR'S
Wealth Management, Insurance And Banking

60 ECTS credits

Admission requirements

The European Bachelor's in Wealth Management, Insurance and Banking requires:

- either prior completion of a European Qualifications Framework (EQF) level-5 degree (120 ECTS credits);
- or official validation of equivalent experience (at least one year's recognised sector-relevant experience).

PROGRAMME CONTENTS

1 - European Regulations

The module provides a global vision of European regulations. It ensures students:

- understand how European regulations have evolved in terms of tax, insurance and banking;
- can assess the difficulties associated with European insurance, tax, banking and financial markets policies and can understand what remains to be done in terms of harmonising the European Economic Area.

This essential knowledge will enable students to understand the European regulatory system, its recent developments and its impact on wealth management.

2 - Wealth Consulting

This module ensures students:

- understand the services offered by wealth consultants;
- are familiar with the main insurance contracts on offer;
- are familiar with the banking sector and the particularities of wealth management;
- are comfortable with securities and the financial market and are able to manage an investment portfolio while paying attention to the legal and fiscal aspects of private wealth management;
- can advise on optimal development of wealth in legal, tax and financial terms, drawing on their knowledge of matrimonial property rights, the differences between furnished and unfurnished property and laws governing inheritance and donations;
- can manage an investment portfolio while paying attention to the legal and fiscal aspects of private wealth management.

3 - Management: Marketing Services, Negotiation and Client Canvassing Techniques, Financial Management

This module ensures students:

- can use Internet-based IT tools to create a services marketing plan (B to C, CRM, e-branding, electronic trade, EDI, computer-supported cooperative work, call centres, GED, data repositories);
- can identify the characteristics and role of service marketing in terms of the evolution of society and of the market;
- are able to make effective use of Web 2.0;
- understand the role and challenges of loyalty schemes;
- have a global vision of an organisation's accounting and financial activity and can conduct a wealth and financial assessment.

4 - Professional Experience

A strong point of FEDE European bachelor's degrees is the requirement for students to consolidate their learning and gain a careers head start through hands-on work experience. The aim is to apply the knowledge and skills acquired during the programme and gain professional confidence.

By completing a work placement in their chosen field, students acquire direct knowledge of the sector and all-important experience in their future role. Students also carry out a supervised project. The project requires them to devise and implement a strategy for completing a professional assignment.

Students produce a dissertation or activity report and present their findings orally.

5 - European Culture and Citizenship

This unit ensures students:

- have a solid knowledge of the workings, institutions, geography, geopolitics and economics of Europe;
- understand the European model and how it differs from other models in terms of history, regulations, law and culture;
- understand Europe in a broader sense (intercultural aspects, human resources, policies, religions, international trade, taxation etc.);
- have the tools necessary to do business in an EU country;
- understand relevant cultural codes and their impact on interpersonal relations;
- can supervise employees and encourage staff mobility in order to raise their international career prospects.

6 - Modern European Language

This module ensures students:

- have CEFR level B1 (writing and speaking) in a modern European language;

It results in the awarding of the FEDE Language Certificate; the Certificate is based on the CEFR and is recognised by the IFEF.

For more information:
https://www.fede.education/fr/nos-diplomes/

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