

Valid from 2026.FS

Module description: International Wealth Management	
Module Code	w.MA.XX.IWM.22HS
ECTS Credits	3
Language of Instruction/Examination	English
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). This 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 explore in depth 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.
Organizational Unit	Institut für Wealth & Asset Management
Module Coordinator	Christoph Künzle
Deputy Module Coordinator	Johannes Höllerich
Program and Specialization	<ul style="list-style-type: none"> • 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	Module Type Compulsory Elective
Prerequisite Knowledge	Basic banking and wealth management.
Contribution to Program Learning Objectives (by the concerned Module)	<ul style="list-style-type: none"> • Professional Competence • Methodological Competence • Social Competence • Self-Competence

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Contribution to Program Learning Objectives	Professional Competence <ul style="list-style-type: none">• 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 <ul style="list-style-type: none">• Problem-Solving & Critical Thinking• Scientific Methodology• Work Methods, Techniques, and Procedures• Information Literacy• Creativity & Innovation Social Competence <ul style="list-style-type: none">• Written Communication• Oral Communication• Teamwork & Conflict Management• Intercultural Insight & Ability to Change Perspective Self-Competence <ul style="list-style-type: none">• Self-Management & Self-Reflection• Ethical & Social Responsibility• Learning & Change																										
Module Learning Objectives	Students... <ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• 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	This module is linked to the following modules:																										
Digital Learning Resources	<ul style="list-style-type: none">• Reader• Teaching Materials																										
Methods of Instruction	<ul style="list-style-type: none">• Lecture• Project Work	Social Settings Used: <ul style="list-style-type: none">• Group Work																									
Type of Instruction	<table><tr><th></th><th>Classroom Instruction</th><th>Guided Self-Study</th><th>Autonomous Self-Study</th></tr><tr><td>Lecture</td><td>26 h</td><td>-</td><td></td></tr><tr><td>Excercise</td><td>-</td><td>-</td><td></td></tr><tr><td>Project Work</td><td>-</td><td>32 h</td><td></td></tr><tr><td>Seminar</td><td>-</td><td>-</td><td></td></tr><tr><td>Total</td><td>26 h</td><td>32 h</td><td>32 h</td></tr></table>				Classroom Instruction	Guided Self-Study	Autonomous Self-Study	Lecture	26 h	-		Excercise	-	-		Project Work	-	32 h		Seminar	-	-		Total	26 h	32 h	32 h
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Performance Assessment	End-of-module exam		Form	Length (min.)	Weighting
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	Permitted Resources				
	Others	Assessment	Format	Length (min.)	Weighting
	Presence and participation <i>Physical presence and oral participation required during all lessons, incl. team presentations</i>	Grade	Einzelarbeit	0	10.00
	Talk/oral presentation	Grade	Gruppenarbeit	20	90.00
Classroom Attendance Requirement	80%				
Compulsory Reading					
Recommended Reading					
Comments	Attendance will be monitored. Unexcused absences may result in a grade reduction or, in serious cases, failure of the entire module.				