



Course and Examination Fact Sheet: Spring Semester 2018

8,182: Private Banking and Wealth Management

ECTS credits: 2

Overview examination/s

(binding regulations see below)

Decentral - examination paper written at home (individual) (100%)

Attached courses

Timetable -- Language -- Lecturer

[8,182,1.00 Private Banking and Wealth Management](#) -- Englisch -- [Zwahlen Stephan A.](#)

Course information

Course prerequisites

Basic knowledge of financial intermediation and banking. Interest in the trends and challenges of the Private Banking and Wealth Management industry.

Course content

The course provides practice-oriented insights into the Swiss Private Banking and Wealth Management industry. This includes a comprehensive overview of the market structures and industry transformation as well as the regulatory and tax environment relevant to private banks. Based on that, strategies and business models in Private Banking followed by value propositions and services in Wealth Management are critically discussed in the light of high market dynamics. Finally, key topics in bank management which are crucial to achieve operational excellence and future challenges for private banks such as digitalization or the needs of next generation bank clients are covered.

Course structure

The syllabus looks as follows:

Lecture 1: Introduction to market structures and industry transformation

Lecture 2: Regulatory and tax environment relevant to private banks

Lecture 3: Strategies and business models in Private Banking

Lecture 4: Value propositions and services in Wealth Management; Assignment of the topic for the examination paper

Lecture 5: Bank management and operational excellence

Lecture 6: Future challenges in Private Banking and Wealth Management



The lectures are enriched by at least two guest speakers who are leading experts from the private banking industry.

Course literature

Extensive reading is required. All documents and relevant web links are provided before the lectures.

Additional course information

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Examination information

Examination sub part/s

1. Examination sub part (1/1)

Examination time and form

Decentral - examination paper written at home (individual) (100%)

Remark

Submission of the paper: 5 weeks after assignment

Examination-aid rule

Term papers

- Term papers must be written without anyone else's help and in accordance with the known quotation standards, and they must contain a declaration of authorship.
- The documentation of sources (quotations, bibliography) has to be done throughout and consistently in accordance with the APA or MLA standards. The indications of the sources of information taken over verbatim or in paraphrase (quotations) must be integrated into the text in accordance with the precepts of the applicable quotation standard, while informative and bibliographical notes must be added as footnotes (recommendations and standards can be found, for example, in METZGER, C. (2015), *Lern- und Arbeitsstrategien* (11th ed., 4th printing). Aarau: Sauerländer).
- For any work written at the HSG, the indication of the page numbers both according to the MLA and the APA standard is never optional.
- Where there are no page numbers in sources, precise references must be provided in a different way: titles of chapters or sections, section numbers, acts, scenes, verses, etc.
- For papers in law, the legal standard is recommended (by way of example, cf. FORSTMOSER, P., OGOREK R. et SCHINDLER B. (2014), *Juristisches Arbeiten: Eine Anleitung für Studierende* (5. Auflage), Zürich: Schulthess, or the recommendations of the Law School).

Supplementary aids

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Examination languages

Question language: English

Answer language: English



Examination content

The topic for the examination paper is related to the broader context of the course.

Examination relevant literature

Based on the literature used in the course and the topic of the examination paper.

Please note

We would like to point out to you that this fact sheet has absolute priority over other information such as StudyNet, faculty members' personal databases, information provided in lectures, etc.

When will the fact sheets become binding?

- Information about courses and examination time (central/decentral and grading form): from the start of the bidding process on 25 January 2018
- Information about decentral examinations (examination-aid rule, examination content, examination relevant literature): after the 4th semester week on 19 March 2018
- Information about central examinations (examination-aid rule, examination content, examination relevant literature): from the start of the enrolment period for the examinations on 09 April 2018

Please look at the fact sheet once more after these deadlines have expired.