

EXECUTIVE EDUCATION

EUROPEAN FINANCIAL ADVISOR

“The challenge is not only knowing what you’re going to do, but more importantly, who you want to be.”

ABOUT EXECUTIVE COURSES

Executive education is a series of courses designed by leading industry experts and top universities to develop and enhance the key professional skills needed to succeed in today's most in-demand career fields. Find a program that meets your specific needs and that will enable you to take your career path one step further.



YOU CHOOSE A COURSE

We offer training programs in many specializations and specializations that are currently in demand and will help you get ahead in your field.

VALUABLE CERTIFICATE

A certificate that demonstrates the knowledge and experience you have gained and is backed by several accreditation associations or major global institutions.

YOU LEARN AT YOUR OWN PACE

All courses are taught online, so you can take them on your PC, tablet or phone, which makes learning flexible and makes time for even the busiest of you.

MOVING YOUR CAREER UP

Use the knowledge and skills you've gained to influence and develop your career at work. This step is up to you.

EXECUTIVE EDUCATION refers primarily to business management courses designed to help the professional development of executives and managers, which are considered part of an ongoing lifelong learning process.

Develop your talent through study at EIFM



We live in a time of constant change. As we venture into this unstable reality, we will have to trust even more not only our core values and sound judgment, but also our ability to challenge the status quo. Creativity will be crucial to successfully navigating the present and the future, enabling us to meet the challenges that lie ahead.

The new leader must be able to combine two strands: on the one hand, the highest degree of professionalism and self-motivation to constantly strive for excellence and, as a result, personal and professional fulfilment; on the other, the generosity with which all these efforts will be devoted to serving others, society and the world. If you consider yourself a challenging and non-conformist person who wants to improve and move forward, and who

“Thanks to the practical experience and knowledge gained, the approach of the lecturers and the materials provided, I can only recommend the EFA course. The EFA certificate has also helped me in my career growth and gaining more prestige with retail clients.”

TIM FRIEDHOFF, student

STUDY BENEFITS

Executive education is an intensive journey of personal and professional transformation that prepares you to meet the challenges of any business environment.

Our certificate programs are special courses that enable business executives to develop their business, leadership, communication and other skills to become better managers and business leaders.



GENERAL OVERVIEW

You'll gain a deep, comprehensive overview of the company from a general management perspective, allowing you to understand the uniqueness of each operational area and their interrelationships, as well as how they affect your decisions.

DECISION-MAKING SKILLS

You will learn that to be an exceptional leader, you must become an expert at making difficult decisions. By examining more than 300 business cases, you will hone your ability to analyze challenging situations, justify your strategy, and decide on the best course of action.

BUSINESS SPIRIT

You will discover the entrepreneur in you. EIFM courses will help you discover new opportunities and gain the knowledge and tools to make the most of them, both inside and outside your organisation.

EFFECTIVE LEADERSHIP

You'll increase your ability to engage your team in top-level projects and manage diverse personal profiles and motivations to align them around a common goal. You will become a leader who is committed to professionalism and integrity and to a spirit of service for the good of the organization and the company.

GLOBAL IMPACT

The program's highly engaging content, teacher guidance and intensive weeks in multiple locations around the world will give you a better understanding of the trends and opportunities shaping today's global business landscape.

PERSONAL GROWTH

The program pushes you to your limits to stimulate deeper self-discovery and the discovery of your strengths and areas of growth. You will emerge better equipped to face any leadership challenge.

WHY STUDY AT EIFM?

GENERAL OVERVIEW

Our goal is lifelong learning. We are here to develop our students and provide them with up-to-date information, skills and knowledge to help them achieve their goals and ambitions in their personal and career lives.

GLOBAL IMPACT

We are aiming not only at the national, but above all at the international level of education provided. Students should be exposed to different ways of thinking and acting, be open to continuous learning and be familiar with global business trends.

EFFECTIVE LEARNING

The aim of our education is to prepare graduates to address contemporary economic, environmental and social challenges that impact society as a whole. We therefore provide our students with innovative and relevant knowledge and know-how that will develop their talents and take them to the next level.

CRITICAL THINKING

Sufficient knowledge and its critical evaluation is the path to freedom. We therefore instill in our students the critical thinking skills and creativity that will prepare them not only to anticipate, but more importantly, to address the challenges they will be forced to face in today's global world.

OUR STUDY YOUR CAREER

We want to be your guide on one of the most important journeys you will take in your life. A journey towards your personal growth, career improvement and fulfillment of your goals. Throughout this journey, we will do everything we can to ensure that you reach your full potential and get the most out of your studies at our Institute.

ADMISSION PROCESS

We accept applicants for specific courses on a rolling basis, subject to availability, and we encourage you to apply as soon as possible. Although most programs have no formal educational requirements, admissions are selective based on your professional achievements and organizational responsibilities. Therefore, your application for a specific course should be accompanied by your CV and, if applicable, a cover letter, which will be used to decide whether you are accepted for admission.

STUDY PROGRAMME

Before starting your studies, you should give due consideration to the programme you are applying for. If you are not 100% sure about this, you can contact our study department to arrange an online video call or other form of session to discuss in detail everything you need to ensure that the final choice of study programme

DECISION ON ADMISSION

In the event of a positive decision by the admissions committee, our study department will contact you to inform you of your admission to study. At the same time, the study department will deal with all the necessary administrative matters such as the study contract and payment of tuition fees.

APPLICATION SUBMISSION

You can fill in the application form online here on our website and attach the necessary documents. These are mainly documents confirming your university education or professional experience.

BEGIN STUDY

Welcome to EIFM! As long as all the above steps have been followed correctly and all the necessary administrative matters have been taken care of, there is nothing stopping you from starting your studies and developing your talents and skills.



STUDY STRUCTURE

The EFA certification training course is ideal for professionals who want to gain a broader knowledge base, deepen their client relationships, earn more and offer unrivalled expertise in financial planning. The starting point of the course is to clarify the impact of preferences, life cycle stages and risks when developing a personal financial plan.



BASIC INFORMATION:

- ✓ SCHEDULE: online form, individual
- ✓ LENGTH OF STUDY: 10 weeks
- ✓ LANGUAGE: english
- ✓ TUITION FEE: € 2,800 excl. VAT
- ✓ STARTING DATE: any time

Tuition fees include study materials and access to all seminars or online lectures organised by the European Institute of Finance & Management. If the student decides to pay the tuition fee in one lump sum before starting the course, a 5% discount on the tuition fee will be applied retrospectively.

The EFA or “European Financial Advisor” certificate is one of the quality standards in the financial advisory industry. It is a prestigious title in the field of finance, financial planning and consulting, which is particularly suitable for financial advisors who focus on more demanding clients and want to continuously improve their quality. This specialized training course is a unique form of education and a great tool for professional development as a financial advisor.

An EFA is a type of financial advisor, but with a certified designation that demonstrates in-depth knowledge of financial planning. Most people who earn the EFA certification work as financial advisors.



BANKING AND INSURANCE



BEHAVIOURAL FINANCE



INVESTMENT AND PORTFOLIO MANAGEMENT



FINANCIAL PLANNING

WHO IS THE STUDY SUITABLE FOR?

ADDED VALUE

In today's competitive financial planning environment, you need to stand out from the crowd and demonstrate your value to current and potential clients.

CREDIBILITY

The certificate course is a highly respected financial planning credential that allows you to grow your practice and expand your portfolio of business, and is the foundation for pursuing deeper and more specialized financial education.

CONFIDENCE

Completing an EFA Certificate course will enable you to build long-term, trusting relationships with clients and institutions. Completing the EFA course supports the growth of an extensive professional network and a consistent code of conduct for advisors.



GRADUATION CERTIFICATE

Upon successful completion of the EFA - European Financial Advisor course, you will receive a certificate of completion from the European Institute of Finance & Management. This course is accredited by the European Financial Advisors Association, the umbrella organisation for educational courses in financial advice and planning.

The certificate will be issued in your legal name and will be sent to you on successful completion of the course in accordance with the specified requirements to the address you have provided on your course application form. The certificate has unlimited validity and can be used throughout your career.

MODULES

FINANCIAL PLANNING AND PRINCIPLES

Upon completion of the course, the student will be equipped with the knowledge and competencies to manage personal finances. The competencies acquired in this course are applicable to personal development and to positions in financial institutions in the area of personal counseling. The course covers the influence of preferences, the life cycle of personal finance, the nature of financial planning and its role in managing personal and family finances. The course also focuses on a detailed explanation of the areas of lending,

TAX SYSTEMS

This course aims to introduce the design of the tax system and teach basic tax administration techniques. By studying this course, students will gain a comprehensive overview of tax issues in the European Union and the ability to deal with specific tax situations independently. Students will gain an overview of the subject of tax, the tax base, and the formalities involved in proving reported tax liabilities. The course provides a comprehensive overview of tax issues in the EU, highlights the procedures of searching and using the tax system in order to reduce tax - the so-called tax optimization.

CAPITAL BUDGETING AND INVESTMENT APPRAISAL

The aim is to provide candidates with a critical understanding of the capital budgeting process to enable them to make informed, reasoned and sustainable capital investment decisions. At the end of this module you will be able to demonstrate a critical understanding of the process of evaluating long-term investments; identify, calculate and apply relevant cash flows and cost of capital within an investment; critically understand the impacts of taxation, inflation and working capital on investment planning and on the cash flows used in evaluating capital investments; and identify and apply appropriate measures of risk and uncertainty in evaluating investments.

VALUATION AND APPRAISAL OF REAL ESTATE

The aim of this course is to enable candidates to understand and appreciate the basic principles of economic theory and investment, the role of the media and the major institutions in the market and how they operate. The role of the valuer and valuation approaches and methods will be introduced to enable candidates to understand the main purposes and fundamentals of value used in the valuation profession.

INVESTMENT ANALYSIS AND MANAGEMENT

Investment analysis and portfolio management is a growing field in finance. The objective of this course is to better understand the various concepts/principles related to investment analysis and portfolio management. It is a core course focusing on investments and risk. It introduces students to the basic principles of investment analysis and portfolio management theory and techniques and covers the main issues of interest to investors today. The curriculum includes the following topics: the global investment environment, portfolio theory and practice, fixed income securities, securities analysis, derivatives analysis and the derivatives market, asset management evaluation, applied portfolio management.

FINANCIAL MARKETS AND INSTITUTIONS

The course focuses on the study of the fundamentals of financial markets and financial instruments, the features of the formation of modern financial markets, the practical application of financial instruments, and the types of financial institutions and their roles and functions in financial markets. The knowledge, skills and competences acquired during the study of this course will be useful for professionals in the fields of finance and banking and foreign exchange in solving various problems of an administrative, analytical, research, clearing and economic nature. It will also be useful for financial concepts and the application of analytical tools in the development of financial strategies.

INSURANCE

This course introduces students to a wide range of information in the field of insurance. In addition to knowledge of insurance theory and insurance law, graduates will gain information about insurance products, and the course covers the procedures needed in the provision of the full range of insurance services and the activities of insurance intermediaries. In addition to the history of the insurance industry, the course also covers the principles and operation of life and non-life insurance and other products.

RETIREMENT PLANNING

This course examines how best to prepare for old age so as not to be destitute when we retire and how to provide for our old age. The course focuses on savings and investment products that can provide an optimal level of income in retirement. The course also covers planning, goal setting and estimating retirement income. The course looks in detail at the area of financial reserving, which is closely related to financial planning.

BANKING PRODUCTS

The aim of the course is to introduce students to the technical terminology in the field of banking products and financial services, central and commercial banking and the principles of commercial banks, as well as the structure of the banking market. The course discusses in detail the types of banks, their operation and establishment, and also looks in detail at individual banking products and banking operations. The course also focuses on international banking operations, the resource structure and other specific aspects of the banking sector.

LEGISLATION, REGULATION AND ETHICS IN INVESTING

The aim of the course is for students to acquire not only knowledge, understanding and skills in financial markets and capital markets law, but also specific knowledge and information from financial activities in the capital market and stock exchange practice. The course teaches students to identify and analyse situations and problems in the regulated financial market, especially in the field of stock exchange. Students will learn to analyze and present organizational, economic, and legal arguments in the field of regulated financial markets. By completing the course, the student will gain a detailed knowledge not only of the basic issues related to securities and book-entry securities, but also of the peculiarities of contracts whose subject matter is securities and book-entry securities, the rules for keeping records of book-entry securities or the specifics of the legal regulation of individual types of securities.

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