

# Executive Master's Degree Financial Advisory

Accreditation/Membership



Economics, Business  
and Enterprise Association





## Executive Master's Degree Financial Advisory

- » Modality: online
- » Duration: 12 months
- » Certificate: TECH Global University
- » Accreditation: 60 ECTS
- » Schedule: at your own pace
- » Exams: online

Website: [www.techtitude.com/us/school-of-business/executive-master-degree/master-financial-advisory](http://www.techtitude.com/us/school-of-business/executive-master-degree/master-financial-advisory)

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01

# Introduction to the Program

The financial sector is in a constant process of transformation, driven by digitalization and the emergence of new trends in investments and economic advisory. According to data from the World Bank, more than 70% of adults globally already use digital financial services. Additionally, the globalization of markets, along with the rise of digital assets such as cryptocurrencies and blockchain technology, has created a highly competitive environment in which professionals must stay updated to stand out. For this reason, TECH has designed this 100% online university program, offering a cutting-edge opportunity in Financial Advisory, covering everything from fundamental principles to the most innovative tools for investment management.





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*An exhaustive and 100% online program, exclusive to TECH, with an international perspective supported by our affiliation with the Economics, Business, and Enterprise Association”*

Financial Advisory is a cornerstone in economic decision-making, whether for individuals, companies, or institutions. In this context, advanced knowledge of markets, taxation, and alternative investments has become an indispensable competitive advantage for professionals in the sector. Furthermore, the incorporation of emerging technologies has redefined how investment risks and opportunities are analyzed, opening new possibilities for growth and specialization.

In response to these needs, TECH presents this Executive Master's Degree in Financial Advisory. This university program will comprehensively address the latest trends in investment, financial planning, and taxation, combining traditional knowledge with innovative strategies in the digital sector. The syllabus will cover a wide range of topics, from macroeconomic fundamentals and the workings of the financial system to portfolio management and new digital investment vehicles. Specific modules on alternative assets, taxation, and financial regulation will ensure that students acquire a well-rounded understanding of the sector.

At the same time, this university qualification offers a 100% online methodology, allowing professionals to train without time restrictions and from any location. Therefore, access to materials is available 24/7 from any internet-enabled device, with the option to download for a flexible learning process. Additionally, the program is based on the Relearning methodology, which will optimize knowledge retention through the strategic repetition of key concepts.

Thanks to the membership in **The Economics, Business and Enterprise Association (EBEA)**, graduates will have access to publications, digital resources, and online seminars to stay up-to-date. They will also be able to participate in annual conferences and apply for the EBEA professional recognition, boosting their growth and professional excellence in economics and business.

This **Executive Master's Degree in Financial Advisory** contains the most complete and up-to-date program on the market. The most important features include:

- ♦ The development of practical cases presented by experts in Financial Advisory
- ♦ The graphic, schematic, and practical contents with which they are created, provide scientific and practical information on the disciplines that are essential for professional practice
- ♦ Practical exercises where the self-assessment process can be carried out to improve learning
- ♦ Special emphasis on innovative methodologies in Financial Advisory management
- ♦ Theoretical lessons, questions to the expert, debate forums on controversial topics, and individual reflection assignments
- ♦ Content that is accessible from any fixed or portable device with an Internet connection



*You will ensure, with excellence, compliance with current financial regulations and standards"*

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*You will explore the constantly evolving financial sector, driven by digitalization and new trends in investment and economic advisory”*

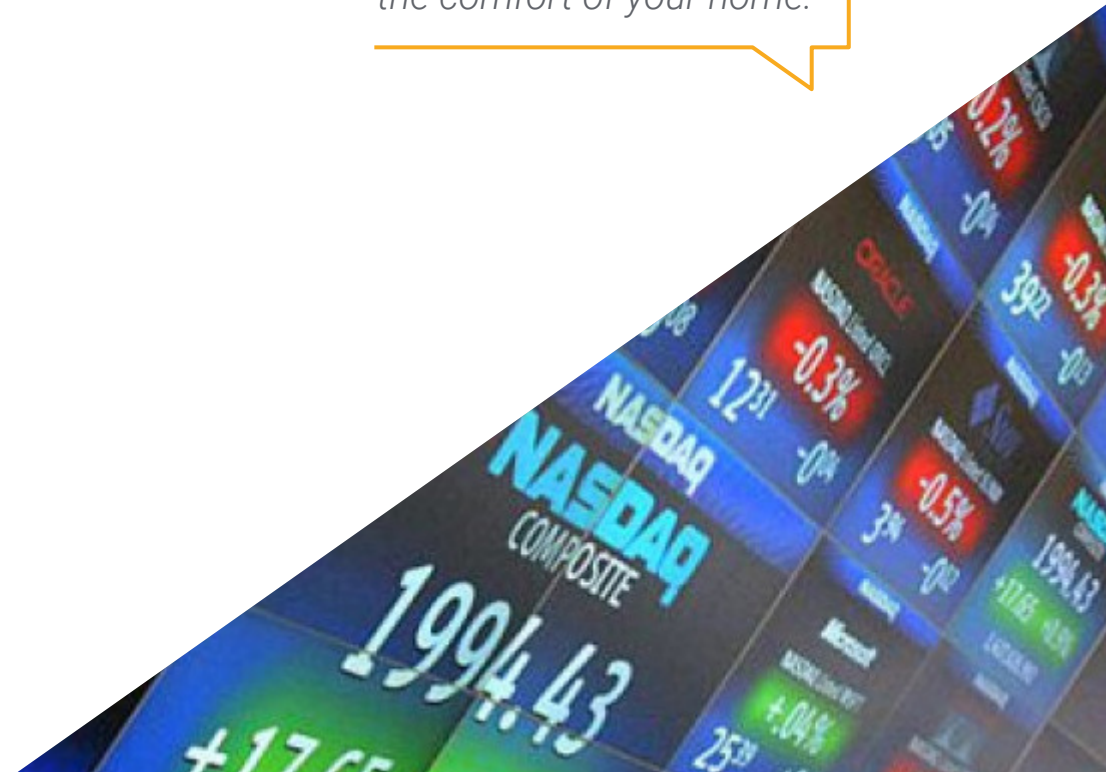
The faculty includes professionals from the Financial Advisory field, who bring their work experience to this program, as well as recognized specialists from leading companies and prestigious universities.

The multimedia content, developed with the latest educational technology, will provide the professional with situated and contextual learning, i.e., a simulated environment that will provide an immersive learning experience designed to prepare for real-life situations.

This program is designed around Problem-Based Learning, whereby the student must try to solve the different professional practice situations that arise throughout the program. For this purpose, the professional will be assisted by an innovative interactive video system created by renowned and experienced experts.

*You will apply key strategies for financial analysis, wealth management, and new trends in digital investment, which will strengthen your position in the sector.*

*Thanks to the Relearning methodology, you will be able to access all the content of this university program from the comfort of your home.*



02

# Why Study at TECH?

TECH is the world's largest online university. With an impressive catalog of more than 14,000 university programs available in 11 languages, it is positioned as a leader in employability, with a 99% job placement rate. In addition, it relies on an enormous faculty of more than 6,000 professors of the highest international renown.





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*Study at the world's largest online university  
and guarantee your professional success.  
The future starts at TECH”*



**The world's best online university, according to FORBES**

The prestigious Forbes magazine, specialized in business and finance, has highlighted TECH as "the best online university in the world" This is what they have recently stated in an article in their digital edition in which they echo the success story of this institution, "thanks to the academic offer it provides, the selection of its teaching staff, and an innovative learning method oriented to form the professionals of the future".

**The best top international faculty**

TECH's faculty is made up of more than 6,000 professors of the highest international prestige. Professors, researchers and top executives of multinational companies, including Isaiah Covington, performance coach of the Boston Celtics; Magda Romanska, principal investigator at Harvard MetaLAB; Ignacio Wistumba, chairman of the department of translational molecular pathology at MD Anderson Cancer Center; and D.W. Pine, creative director of TIME magazine, among others.

**The world's largest online university**

TECH is the world's largest online university. We are the largest educational institution, with the best and widest digital educational catalog, one hundred percent online and covering most areas of knowledge. We offer the largest selection of our own degrees and accredited online undergraduate and postgraduate degrees. In total, more than 14,000 university programs, in ten different languages, making us the largest educational institution in the world.



**The most complete syllabuses on the university scene**

TECH offers the most complete syllabuses on the university scene, with programs that cover fundamental concepts and, at the same time, the main scientific advances in their specific scientific areas. In addition, these programs are continuously updated to guarantee students the academic vanguard and the most demanded professional skills. and the most in-demand professional competencies. In this way, the university's qualifications provide its graduates with a significant advantage to propel their careers to success.

**A unique learning method**

TECH is the first university to use Relearning in all its programs. This is the best online learning methodology, accredited with international teaching quality certifications, provided by prestigious educational agencies. In addition, this innovative academic model is complemented by the "Case Method", thereby configuring a unique online teaching strategy. Innovative teaching resources are also implemented, including detailed videos, infographics and interactive summaries.

#### The official online university of the NBA

TECH is the official online university of the NBA. Thanks to our agreement with the biggest league in basketball, we offer our students exclusive university programs, as well as a wide variety of educational resources focused on the business of the league and other areas of the sports industry. Each program is made up of a uniquely designed syllabus and features exceptional guest hosts: professionals with a distinguished sports background who will offer their expertise on the most relevant topics.

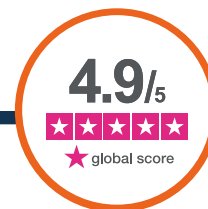
#### Leaders in employability

TECH has become the leading university in employability. Ninety-nine percent of its students obtain jobs in the academic field they have studied within one year of completing any of the university's programs. A similar number achieve immediate career enhancement. All this thanks to a study methodology that bases its effectiveness on the acquisition of practical skills, which are absolutely necessary for professional development.



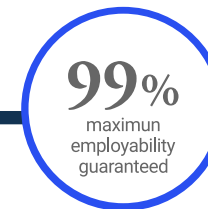
#### Google Premier Partner

The American technology giant has awarded TECH the Google Premier Partner badge. This award, which is only available to 3% of the world's companies, highlights the efficient, flexible and tailored experience that this university provides to students. The recognition not only accredits the maximum rigor, performance and investment in TECH's digital infrastructures, but also places this university as one of the world's leading technology companies.



#### The top-rated university by its students

Students have positioned TECH as the world's top-rated university on the main review websites, with a highest rating of 4.9 out of 5, obtained from more than 1,000 reviews. These results consolidate TECH as the benchmark university institution at an international level, reflecting the excellence and positive impact of its educational model.



# 03 Syllabus

This Executive Master's Degree offers a comprehensive syllabus designed by experts in Financial Advisory. It will cover key topics such as the update of the value of money, capitalization, commercial discounting, and interest rates. The program will also address financial profitability, rates such as IRR (Internal Rate of Return), NPV (Net Present Value), and TGR (Total Growth Rate), as well as financial annuities and investment valuation. In addition, statistical tools, variable analysis, and correlation will be incorporated. With advanced methodologies, this university program will enable you to evaluate investments, develop effective strategies, and lead financial decisions in competitive environments, ensuring a solid understanding of markets and new economic trends.



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*You will optimize financial decision-making  
and develop strategies to maximize  
profitability in competitive markets”*

## Module 1. Macroeconomics and Financial Systems

- 1.1. Macroeconomics
  - 1.1.1. Growth Indicators
  - 1.1.2. Price Indicators
  - 1.1.3. Employment and Other Indicators
- 1.2. Economic Cycles
  - 1.2.1. Cycle Theory
  - 1.2.2. Cycle Phases
  - 1.2.3. Cycle Types
- 1.3. Economic Indicators
  - 1.3.1. On Offer
  - 1.3.2. In Demand
  - 1.3.3. Of Feeling
- 1.4. Financial Systems
  - 1.4.1. Financial Assets
  - 1.4.2. Financial Markets
  - 1.4.3. Financial Institutions
- 1.5. The ECB (European Central Bank)
  - 1.5.1. Current Situation and Historical Evolution
  - 1.5.2. ECB Functions
  - 1.5.3. Money Market
- 1.6. Monetary Policy
  - 1.6.1. Monetary Policy Strategies
  - 1.6.2. Monetary Policy Instruments
  - 1.6.3. Monetary Policy Developments
- 1.7. History of Macroeconomic Thought I
- 1.7. History of Macroeconomic Thought II
- 1.8. Macroeconomic Situation in the 21st Century







## Module 2. Investment Fundamentals

- 2.1. Temporal Value of Money
  - 2.1.1. Financial Capital
  - 2.1.2. Financial Equivalence
  - 2.1.3. Operation and Financial Law
- 2.2. Capitalization
  - 2.2.1. Simple
  - 2.2.2. Compounds
  - 2.2.3. Use of Calculators for Calculations
- 2.3. Update
  - 2.3.1. Simple
  - 2.3.2. Compounds
  - 2.3.3. Use of Calculators for Calculations
- 2.4. Commercial Discount
  - 2.4.1. Simple
  - 2.4.2. Compounds
  - 2.4.3. Use of Calculators for Calculations
- 2.5. Interest Rates
  - 2.5.1. *Spot*
  - 2.5.2. *Forward*
  - 2.5.3. How to Calculate Forward Interest Rates
- 2.6. Types of Return I
  - 2.6.1. Nominal and Real
  - 2.6.2. Simple Return
  - 2.6.3. Annual Percentage Rate (APR)
- 2.7. Types of Return II
  - 2.7.1. Internal Rate of Return (IRR)
  - 2.7.2. Effective Rate of Return (ERR)
  - 2.7.3. Geometric Rate of Return (GRR)

- 2.8. Financial Income
  - 2.8.1. Concept and Classification of Different Income Types
  - 2.8.2. Proportionality and Income Addition
  - 2.8.3. Certain and Constant Income Valuation
- 2.9. Basic Concepts of Statistics
  - 2.9.1. Qualitative and Quantitative Variables:
  - 2.9.2. Position Measurements
  - 2.9.3. Measures of Dispersion
- 2.10. Two-Dimensional Variables
  - 2.10.1. Covariance
  - 2.10.2. Coefficient Correlation
  - 2.10.3. Regression Line

### Module 3. Fixed Income

- 3.1. Fixed Income General Characteristics
  - 3.1.1. Negotiated Assets
- 3.2. Public Debt Market Structure
  - 3.2.1. Negotiated Assets
  - 3.2.2. Market Members
  - 3.2.3. Primary and Secondary Markets
- 3.3. Private Fixed-Income Market
  - 3.3.1. Market Structure
  - 3.3.2. Market Operations
  - 3.3.3. Asset Typology
- 3.4. *Rating*
  - 3.4.1. Needs and Advantages of Rating
  - 3.4.2. Classification
  - 3.4.3. Rating Companies
- 3.5. Risks Associated with Fixed-Income Assets
  - 3.5.1. Interest and Credit Risk
  - 3.5.2. Liquidity and Exchange Rate Risk
  - 3.5.3. Early Amortization Risk

- 3.6. Fixed Income Asset Valuation
  - 3.6.1. Zero Coupon Bonds and Treasury Bills
  - 3.6.2. Coupon Bonds
  - 3.6.3. Full price, Ex-Coupon Price and Running Coupon Price
- 3.7. Price - IRR (Internal Rate of Return) Relationship
  - 3.7.1. Malkiel's First Principle
  - 3.7.2. Malkiel's Second and Third Principles
  - 3.7.3. Malkiel's Fourth and Fifth Principles
- 3.8. Income Curve and Interest Rate Term Structure
  - 3.8.1. Income Curves
  - 3.8.2. Explanatory Theory of ETTI
  - 3.8.3. Standardized Interest Rate Structure
- 3.9. Interest Rate Risk Measurement and Management
  - 3.9.1. Sensitivity
  - 3.9.2. Duration and Corrected Duration
  - 3.9.3. Immunisation
- 3.10. Risk Profile for Each Investment Type
  - 3.10.1. Cautious Profile
  - 3.10.2. Moderate Profile
  - 3.10.3. At Risk Profile

### Module 4. Equities

- 4.1. Equity Characteristics
  - 4.1.1. Operation
  - 4.1.2. Financial Market Profits
  - 4.1.3. Evolution Over Time
- 4.2. Structure and Functioning of the Stock Market
  - 4.2.1. Market Schedules and Phases (Auctions and Continuous Trading)
- 4.3. Types of Stock Market Transactions I
  - 4.3.1. Initial Public Offering (IPO)
  - 4.3.2. Secondary Public Offering (SPO)
  - 4.3.3. Capital Increases and Reductions

- 4.4. Types of Stock Market Transactions II
  - 4.4.1. Stock Splits and Reverse Stock Splits
  - 4.4.2. Dividends
  - 4.4.3. Takeover Bids (OPAs)
- 4.5. Main Orders
  - 4.5.1. Market Order
  - 4.5.2. Limit and Stop Orders
  - 4.5.3. Trailing Stop
- 4.6. Tracking the Evolution of Equity
  - 4.6.1. Indices
  - 4.6.2. Classification of Indices
  - 4.6.3. Uses of Equity Indices
- 4.7. Broker Platforms (CMC and IB)
  - 4.7.1. Types of Brokers
  - 4.7.2. CMC
  - 4.7.3. *Interactive Brokers*
- 4.8. Fundamental Analysis
  - 4.8.1. Macroeconomic Analysis
  - 4.8.2. Stock Valuation Ratios
  - 4.8.3. Cycle Theory
- 4.9. Company Valuation
  - 4.9.1. VCP, VCA, VL and VS
  - 4.9.2. Gordon - Shapiro
  - 4.9.3. Flow Discounts
- 4.10. Technical Analysis
  - 4.10.1. Chartism
  - 4.10.2. Indicators
  - 4.10.3. Oscillators

## Module 5. Collective Investment Institutions and Pension Plans

- 5.1. Collective Investment Institutions
  - 5.1.1. Evolution of Investment in IICs
  - 5.1.2. Participants
- 5.2. Investment Funds and SICAVs
  - 5.2.1. Management Styles
  - 5.2.2. Categories
  - 5.2.3. Calculation of NAV (Net Asset Value)
- 5.3. Commissions
  - 5.3.1. Implicit Commissions
  - 5.3.2. Explicit Commissions
  - 5.3.3. Other Expenses
- 5.4. Comparison of Investment Funds
  - 5.4.1. Profitability
  - 5.4.2. Risk
  - 5.4.3. Other Ratios
- 5.5. Hedge Funds/Alternative Investment Funds
  - 5.5.1. Fundamentals of Alternative Management
  - 5.5.2. Characteristics of Hedge Funds
  - 5.5.3. Investment Strategies and Styles
- 5.6. Regulatory Aspects in the Creation of Investment Funds
  - 5.6.1. Obligations of Management Institutions
  - 5.6.2. Obligations of Depository Institutions
  - 5.6.3. Information
- 5.7. Pension Plan Definition
  - 5.7.1. Differences Between a Pension Plan and a Pension Fund
  - 5.7.2. Guiding Principles
- 5.8. Pension Plan Modalities
  - 5.8.1. According to the Type of Promoting Entity
  - 5.8.2. According to the Contribution and Benefit System
  - 5.8.3. According to Investment Goals

## Module 6. Foreign Exchange and Derivatives

- 6.1. Foreign Exchange Market
  - 6.1.1. Evolution of Money and Currencies
  - 6.1.2. Exchange Rate
  - 6.1.3. Currency Pairs
- 6.2. Complex Products
  - 6.2.1. Derivative Products
  - 6.2.2. Different Uses of Complex Products
  - 6.2.3. Types of Derivative Products
- 6.3. Futures
  - 6.3.1. Speculation
  - 6.3.2. Hedging
  - 6.3.3. Arbitrage
- 6.4. Options
  - 6.4.1. *Call Option*
  - 6.4.2. *Put Option*
  - 6.4.3. Premium
- 6.5. Option Sensitivity
  - 6.5.1. Delta and Gamma
  - 6.5.2. Vega and Theta
  - 6.5.3. Rho
- 6.6. Trend Strategies
  - 6.6.1. Bull Spread
  - 6.6.2. Bear Spread
  - 6.6.3. Tunnel
- 6.7. Volatility Strategies
  - 6.7.1. Straddle, Strangle and Guts
  - 6.7.2. *Butterfly*
  - 6.7.3. Condor



- 6.8. Mixed Strategies I
  - 6.8.1. Ratio Call Spread
  - 6.8.2. Ratio Put Spread
  - 6.8.3. Ratio Call Back Spread
- 6.9. Mixed Strategies II
  - 6.9.1. Ratio Put Back Spread
  - 6.9.2. Strip and Strap
  - 6.9.3. *Calendar Spread*
- 6.10. Structured Products
  - 6.10.1. Characteristics and Risks
  - 6.10.2. Guaranteed
  - 6.10.3. Reverse Convertible

## Module 7. Portfolio Management

- 7.1. Client Profile Analysis
  - 7.1.1. Investment Objective
  - 7.1.2. Client's Profitability and Risk
  - 7.1.3. Investment Horizon
- 7.2. Contracts and Regulations
  - 7.2.1. MiFID II
  - 7.2.2. Suitability Test
  - 7.2.3. Risk Profiles
- 7.3. Introduction to Portfolio Management
  - 7.3.1. Market Efficiencies
  - 7.3.2. Market Failures
  - 7.3.3. Active Management vs. Passive Management
- 7.4. Return and Risk
  - 7.4.1. Of an Asset
  - 7.4.2. Of the Portfolio
  - 7.4.3. Normality Hypothesis
- 7.5. Diversification
  - 7.5.1. Types of Risk
  - 7.5.2. Correlation
  - 7.5.3. Beta
- 7.6. Portfolio Theories
  - 7.6.1. Efficient Portfolio
  - 7.6.2. CML (Capital Market Line)
  - 7.6.3. SML (Security Market Line)
- 7.7. Measurement Ratios I
  - 7.7.1. Sharpe Ratio
  - 7.7.2. Treynor Ratio
  - 7.7.3. Jensen's Alpha
- 7.8. Measurement Ratios II
  - 7.8.1. Tracking Error
  - 7.8.2. Information Ratio
  - 7.8.3. Consistency
- 7.9. Excel Applied to Portfolio Management
  - 7.9.1. Data Sources
  - 7.9.2. Sheet Programming
  - 7.9.3. Result Interpretation
- 7.10. New Investment Criteria in Portfolio Management
  - 7.10.1. ESG (Environmental, Social, and Governance)
  - 7.10.2. Portable Alpha
  - 7.10.3. MFI (Market Factor Investing)



## Module 8. Financial Planning

- 8.1. Financial Advisory
  - 8.1.1. Independent Advisory
  - 8.1.2. Dependent Advisory
  - 8.1.3. Portfolio Management
- 8.2. Basic Principles for Retirement Planning
  - 8.2.1. How Long Do I Need to Contribute?
  - 8.2.2. How to Calculate My Pension
  - 8.2.3. What Pension Am I Entitled to?
- 8.3. Analysis of Expenses and Income at Retirement
  - 8.3.1. Difference in Income Once Retirement is Reached
  - 8.3.2. Expense Structure (Fixed and Variable) vs. Income During Retirement
  - 8.3.3. Where to Obtain Extra Income in Retirement. Advantages and Disadvantages of Withdrawals
- 8.4. Capital Accumulation Plan
  - 8.4.1. Weighted Average Price
  - 8.4.2. Investment Strategy
  - 8.4.3. Technical Development
- 8.5. Life Cycle
  - 8.5.1. Formation and Accumulation Phase
  - 8.5.2. Consolidation Phase
  - 8.5.3. Spending Phase and Donation Phase
- 8.6. Analysis and Selection of Funds
  - 8.6.1. Risk Profiles
  - 8.6.2. Ratios to Check
  - 8.6.3. Study of Expenses and Historical Results
- 8.7. Tax Planning for Pension Plans
  - 8.7.1. Taxation
  - 8.7.2. Withdrawals
  - 8.7.3. Bonuses

- 8.8. Inheritance Planning
  - 8.8.1. Types of Assets I Can Own
  - 8.8.2. Tax Implications of These Assets
  - 8.8.3. Inheritance Structure to Minimize Tax Impact
- 8.9. Psychology Applied to Investment
  - 8.9.1. Relevant Aspects
  - 8.9.2. Biases
  - 8.9.3. Managing Client Psychology
- 8.10. Financial Planning Strategies
  - 8.10.1. Primarily Real Estate Assets
  - 8.10.2. Primarily Financial Assets
  - 8.10.3. Asset Allocation Between Real Estate and Financial Assets

## Module 9. Taxation

- 9.1. Personal Income Tax I
  - 9.1.1. Income from Employment
  - 9.1.2. Income from Economic Activities
  - 9.1.3. Imputation of Income
- 9.2. Personal Income Tax II
  - 9.2.1. Income from Capital
  - 9.2.2. Capital Gains and Losses
  - 9.2.3. Tax Settlement Scheme. Income Integration and Compensation
- 9.3. Corporate Tax (IS)
  - 9.3.1. Corporate Income Tax
  - 9.3.2. Positive and Negative Adjustments
  - 9.3.3. Tax Settlement Scheme
- 9.4. Inheritance and Donations Tax (ISD)
  - 9.4.1. Tax Components
  - 9.4.2. Adjustments
  - 9.4.3. Tax Settlement Scheme
- 9.5. Taxation of Financial Transactions I
- 9.6. Taxation of Financial Transactions II

## Module 10. New Investments

- 10.1. *Crowdfunding*
  - 10.1.1. Financing Through Crowdfunding
  - 10.1.2. Crowdfunding vs. Traditional Investments
  - 10.1.3. Regulation
- 10.2. Blockchain Technology
  - 10.2.1. Blockchain Networks
  - 10.2.2. Mining
  - 10.2.3. Blockchain Uses
- 10.3. Cryptocurrencies
  - 10.3.1. Fiat Currencies vs. Cryptocurrencies
  - 10.3.2. Cryptocurrencies Today
  - 10.3.3. DeFi (Decentralized Finance)
- 10.4. Main Cryptocurrencies
  - 10.4.1. Bitcoin
  - 10.4.2. Ether
  - 10.4.3. Altcoins
- 10.5. Exchanges and Wallets
  - 10.5.1. Exchanges
  - 10.5.2. *Cold Wallets*
  - 10.5.3. *Hot Wallets*
- 10.6. Other Forms of Investment with Cryptocurrencies
  - 10.6.1. *Staking*
  - 10.6.2. Derivatives
  - 10.6.3. Crypto Indexes and New Indexing Forms
- 10.7. Risks and Weaknesses
  - 10.7.1. Market Risk
  - 10.7.2. Legal Risk
  - 10.7.3. Reputational Risk
- 10.8. NFTs and Digital Assets
  - 10.8.1. NFTs and Major Networks
  - 10.8.2. Digital Art
  - 10.8.3. Metaverse
- 10.9. Tokenization of the Economy
  - 10.9.1. Tokenization
  - 10.9.2. Current Uses of Tokens
  - 10.9.3. Potential
- 10.10. Regulation
  - 10.10.1. Possible Future Changes
  - 10.10.2. Pioneer Countries in Cryptocurrency and Other Cryptoassets Regulation



*You will design personalized financial plans that optimize the economic situation of individuals and companies”*

# 04 Teaching Objectives

This comprehensive university program at TECH is designed to provide financial professionals with the necessary tools to analyze, manage, and optimize investment strategies. Graduates will be able to interpret market trends and maximize profitability. Therefore, students will develop skills in Financial Advisory, strategic leadership, and data-driven decision-making. Additionally, they will enhance key abilities to tackle complex and changing financial environments, with a global perspective, professional ethics, and a results-oriented approach.



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*You will be able to lead investment strategies  
and optimize wealth management with an  
innovative focus”*





## General Objectives

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- ♦ Develop advanced knowledge in investment, taxation, and financial markets, understanding their impact on strategic decision-making
- ♦ Identify opportunities and risks in portfolio and investment fund management to optimize profitability
- ♦ Apply financial tools to evaluate investments in fixed and variable income, derivatives, and other assets
- ♦ Analyze the regulatory and fiscal framework for investments in the global financial environment
- ♦ Implement risk analysis methodologies for informed financial decision-making
- ♦ Use financial asset valuation models and portfolio diversification strategies
- ♦ Design innovative investment strategies, incorporating digital technologies and new financial vehicles
- ♦ Encourage continuous updates on international financial regulations and standards



*You will master advanced financial strategies and be prepared to face the challenges of the global market”*







## Specific Objectives

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### Module 1. Macroeconomics and Financial Systems

- ♦ Understand the structure of the financial system and its regulation
- ♦ Analyze macroeconomic indicators and their influence on markets

### Module 2. Investment Fundamentals

- ♦ Apply the time value of money in decision-making
- ♦ Identify strategies for financial capitalization and discounting

### Module 3. Fixed Income

- ♦ Evaluate fixed-income assets and their associated risks
- ♦ Analyze the relationship between profitability and risk in bond investments

### Module 4. Equities

- ♦ Interpret equity markets and their primary investment strategies
- ♦ Apply fundamental and technical analysis in asset selection

### Module 5. Collective Investment Institutions and Pension Plans

- ♦ Analyze different types of investment funds and their regulation
- ♦ Evaluate pension plans and their tax impact

### Module 6. Foreign Exchange and Derivatives

- ♦ Understand the functioning of the foreign exchange market and its relation to international investments
- ♦ Apply derivative strategies for hedging and speculation

### Module 7. Portfolio Management

- ♦ Design and manage diversified investment portfolios
- ♦ Apply theories of profitability and risk in asset management

### Module 8. Financial Planning

- ♦ Develop personalized financial and tax planning strategies
- ♦ Implement financial scenario analysis for decision-making

### Module 9. Taxation

- ♦ Evaluate the tax implications of investment decisions
- ♦ Apply tax regulations in the tax optimization of portfolios

### Module 10. New Investments

- ♦ Analyze opportunities in cryptocurrencies, blockchain, and digital assets
- ♦ Explore emerging trends in tokenization and the digital economy

05

# Career Opportunities

This Executive Master's Degree represents an exceptional opportunity for professionals who wish to specialize in Financial Advisory and master advanced tools for strategic decision-making in today's markets. Through this cutting-edge knowledge, graduates of this university program will expand their career opportunities across various economic sectors. In this way, graduates will be prepared to take on more significant strategic roles in the most prestigious institutions. Additionally, they will be capable of serving as financial directors, risk analysts, wealth managers, economic consultants, and investment advisors.





“

*You will apply financial analysis techniques  
and perform state-of-the-art wealth  
management based on data”*

### Graduate Profile

The graduate of this Executive Master's Degree from TECH will be prepared to lead investment strategies, assess risks, and maximize returns. They will also have the skills to design personalized financial plans, manage portfolios, and analyze opportunities in emerging markets. Furthermore, they will possess a deep understanding of fiscal regulation and its impact on economic decisions. As a result, the professional will also be able to work in consulting firms, banking institutions, and fund management companies, contributing a strategic approach based on data and global trends.

*You will be able to excel as a Financial Advisor in any banking institution or investment firm, applying innovative tools to optimize wealth management.*

- ♦ **Personalized Financial Planning:** Develop investment strategies aligned with each client's financial goals, maximizing profitability and minimizing risks
- ♦ **Risk and Market Analysis:** Interpret financial indicators and assess investment opportunities in various economic sectors
- ♦ **Regulatory Compliance and Taxation:** Master financial and tax regulations to ensure compliance with current norms in local and international markets
- ♦ **Investment Strategies in Digital Assets:** Implement knowledge in cryptocurrencies, blockchain, and other emerging investment vehicles to diversify portfolios





After completing the university program, you will be able to apply your knowledge and skills in the following positions:

- 1. Private Banking Financial Advisor:** Responsible for designing personalized investment strategies for high-net-worth clients.
- 2. Financial Risk Analyst:** In charge of evaluating and mitigating risks in banking institutions and corporations.
- 3. Investment Portfolio Manager:** Responsible for managing investment funds with profitability and security criteria.
- 4. Consultant in Tax and Financial Planning:** Focused on designing tax strategies and optimizing taxation processes.
- 5. Corporate Wealth Manager:** Responsible for the financial planning of companies and large corporations.
- 6. Financial Strategy Director:** In charge of making economic decisions in investment firms and consulting companies.
- 7. Mergers and Acquisitions Advisor:** Focused on company valuation and structuring strategic transactions.
- 8. Compliance Officer:** Responsible for ensuring compliance with financial regulations in companies and banking institutions.



*Become an expert in Financial Advisory and lead investment strategies with a competitive approach”*



06

# Study Methodology

TECH is the world's first university to combine the **case study** methodology with **Relearning**, a 100% online learning system based on guided repetition.

This disruptive pedagogical strategy has been conceived to offer professionals the opportunity to update their knowledge and develop their skills in an intensive and rigorous way. A learning model that places students at the center of the educational process giving them the leading role, adapting to their needs and leaving aside more conventional methodologies.



“

*TECH will prepare you to face new challenges in uncertain environments and achieve success in your career”*



## The student: the priority of all TECH programs

In TECH's study methodology, the student is the main protagonist.

The teaching tools of each program have been selected taking into account the demands of time, availability and academic rigor that, today, not only students demand but also the most competitive positions in the market.

With TECH's asynchronous educational model, it is students who choose the time they dedicate to study, how they decide to establish their routines, and all this from the comfort of the electronic device of their choice. The student will not have to participate in live classes, which in many cases they will not be able to attend. The learning activities will be done when it is convenient for them. They can always decide when and from where they want to study.

“

*At TECH you will NOT have live classes  
(which you might not be able to attend)”*



### The most comprehensive study plans at the international level

TECH is distinguished by offering the most complete academic itineraries on the university scene. This comprehensiveness is achieved through the creation of syllabi that not only cover the essential knowledge, but also the most recent innovations in each area.

By being constantly up to date, these programs allow students to keep up with market changes and acquire the skills most valued by employers. In this way, those who complete their studies at TECH receive a comprehensive education that provides them with a notable competitive advantage to further their careers.

And what's more, they will be able to do so from any device, pc, tablet or smartphone.

“*TECH's model is asynchronous, so it allows you to study with your pc, tablet or your smartphone wherever you want, whenever you want and for as long as you want*”



## Case Studies and Case Method

The case method has been the learning system most used by the world's best business schools. Developed in 1912 so that law students would not only learn the law based on theoretical content, its function was also to present them with real complex situations. In this way, they could make informed decisions and value judgments about how to resolve them. In 1924, Harvard adopted it as a standard teaching method.

With this teaching model, it is students themselves who build their professional competence through strategies such as Learning by Doing or Design Thinking, used by other renowned institutions such as Yale or Stanford.

This action-oriented method will be applied throughout the entire academic itinerary that the student undertakes with TECH. Students will be confronted with multiple real-life situations and will have to integrate knowledge, research, discuss and defend their ideas and decisions. All this with the premise of answering the question of how they would act when facing specific events of complexity in their daily work.



## Relearning Methodology

At TECH, case studies are enhanced with the best 100% online teaching method: Relearning.

This method breaks with traditional teaching techniques to put the student at the center of the equation, providing the best content in different formats. In this way, it manages to review and reiterate the key concepts of each subject and learn to apply them in a real context.

In the same line, and according to multiple scientific researches, reiteration is the best way to learn. For this reason, TECH offers between 8 and 16 repetitions of each key concept within the same lesson, presented in a different way, with the objective of ensuring that the knowledge is completely consolidated during the study process.

*Relearning will allow you to learn with less effort and better performance, involving you more in your specialization, developing a critical mindset, defending arguments, and contrasting opinions: a direct equation to success.*



## A 100% online Virtual Campus with the best teaching resources

In order to apply its methodology effectively, TECH focuses on providing graduates with teaching materials in different formats: texts, interactive videos, illustrations and knowledge maps, among others. All of them are designed by qualified teachers who focus their work on combining real cases with the resolution of complex situations through simulation, the study of contexts applied to each professional career and learning based on repetition, through audios, presentations, animations, images, etc.

The latest scientific evidence in the field of Neuroscience points to the importance of taking into account the place and context where the content is accessed before starting a new learning process. Being able to adjust these variables in a personalized way helps people to remember and store knowledge in the hippocampus to retain it in the long term. This is a model called Neurocognitive context-dependent e-learning that is consciously applied in this university qualification.

In order to facilitate tutor-student contact as much as possible, you will have a wide range of communication possibilities, both in real time and delayed (internal messaging, telephone answering service, email contact with the technical secretary, chat and videoconferences).

Likewise, this very complete Virtual Campus will allow TECH students to organize their study schedules according to their personal availability or work obligations. In this way, they will have global control of the academic content and teaching tools, based on their fast-paced professional update.



*The online study mode of this program will allow you to organize your time and learning pace, adapting it to your schedule"*

### The effectiveness of the method is justified by four fundamental achievements:

1. Students who follow this method not only achieve the assimilation of concepts, but also a development of their mental capacity, through exercises that assess real situations and the application of knowledge.
2. Learning is solidly translated into practical skills that allow the student to better integrate into the real world.
3. Ideas and concepts are understood more efficiently, given that the example situations are based on real-life.
4. Students like to feel that the effort they put into their studies is worthwhile. This then translates into a greater interest in learning and more time dedicated to working on the course.



## The university methodology top-rated by its students

The results of this innovative teaching model can be seen in the overall satisfaction levels of TECH graduates.

The students' assessment of the teaching quality, the quality of the materials, the structure of the program and its objectives is excellent. Not surprisingly, the institution became the top-rated university by its students according to the global score index, obtaining a 4.9 out of 5.

*Access the study contents from any device with an Internet connection (computer, tablet, smartphone) thanks to the fact that TECH is at the forefront of technology and teaching.*

*You will be able to learn with the advantages that come with having access to simulated learning environments and the learning by observation approach, that is, Learning from an expert.*





As such, the best educational materials, thoroughly prepared, will be available in this program:



#### Study Material

All teaching material is produced by the specialists who teach the course, specifically for the course, so that the teaching content is highly specific and precise.

This content is then adapted in an audiovisual format that will create our way of working online, with the latest techniques that allow us to offer you high quality in all of the material that we provide you with.



#### Practicing Skills and Abilities

You will carry out activities to develop specific competencies and skills in each thematic field. Exercises and activities to acquire and develop the skills and abilities that a specialist needs to develop within the framework of the globalization we live in.



#### Interactive Summaries

We present the contents attractively and dynamically in multimedia lessons that include audio, videos, images, diagrams, and concept maps in order to reinforce knowledge.

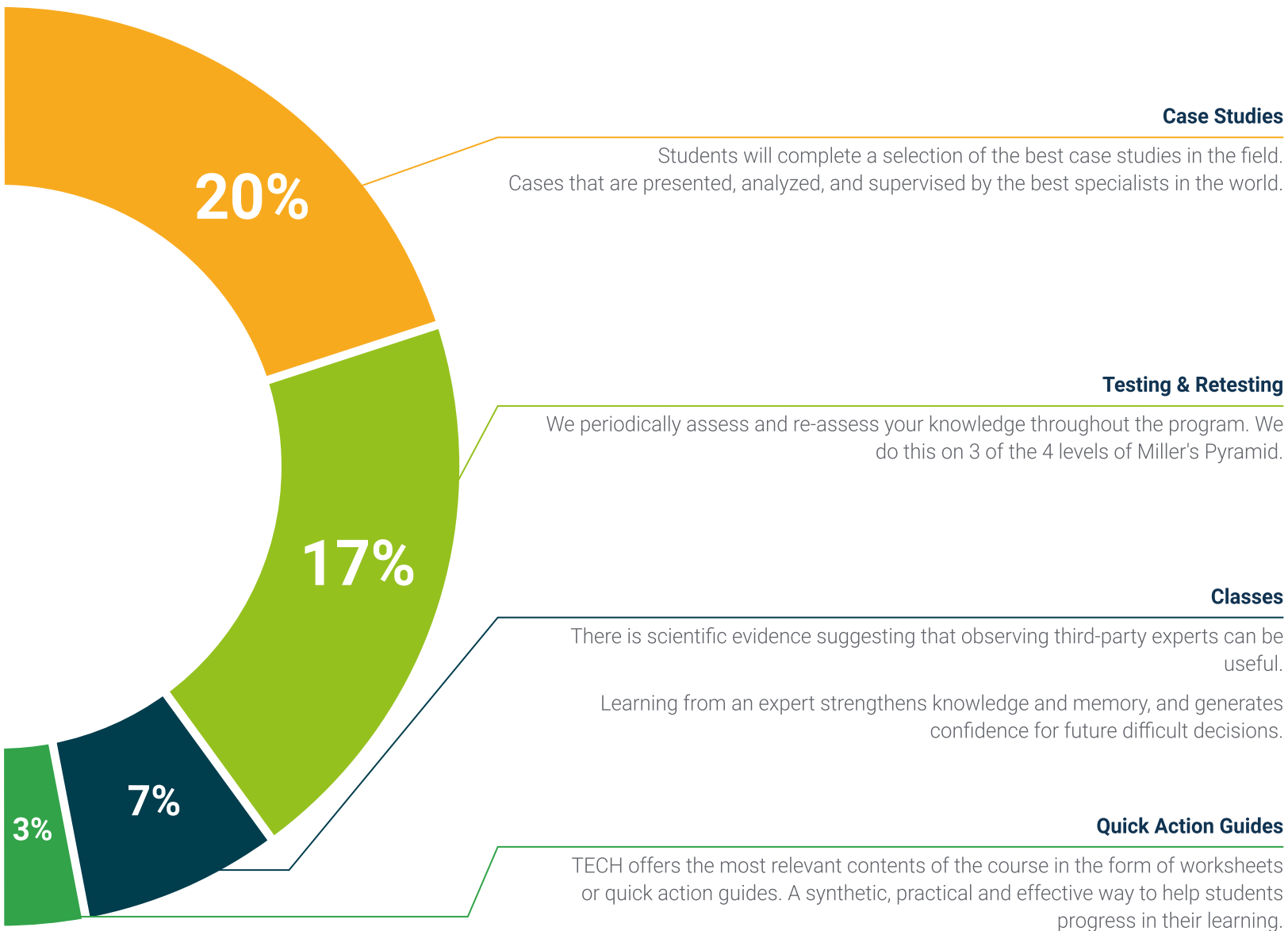
This exclusive educational system for presenting multimedia content was awarded by Microsoft as a "European Success Story".



#### Additional Reading

Recent articles, consensus documents, international guides... In our virtual library you will have access to everything you need to complete your education.





07

# Teaching Staff

Financial Advisory is a specialized and constantly evolving field, which is why TECH has gathered a group of professionals who are deeply familiar with the current market reality and have a strong track record. In fact, the faculty will enrich the educational content with an innovative approach that combines cutting-edge theoretical knowledge with a practical perspective on the most relevant challenges facing financial advisors, ensuring a more comprehensive and focused training. As a result, graduates will gain advanced knowledge that they can apply effectively in the sector.



“

*You will benefit from personalized guidance from the teaching team, composed of true references in Financial Advisory”*



## Management



### Mr. Olivares Pont, Manuel

- ♦ Wealth Manager at GPM
- ♦ Wealth Manager at Andbank Spain
- ♦ Wealth Manager at Esfera Capital A.V.
- ♦ Wealth Manager at Q-Renta AV
- ♦ Managing Partner at ARBD Consulting
- ♦ Personal Banking Consultant and Financial Advisor at Banco Mediolanum
- ♦ Trainer for EFA Certification and Financial Instruments for Commercial Networks at ISEFI, SANFI, and Praxis MMT
- ♦ Bachelor's in Business Administration and Management from Complutense University of Madrid

## Teachers

### Ms. Paños Martín, Julia

- ♦ Select Manager at Santander Bank
- ♦ Financial Advisor at GPM
- ♦ Account Manager at Esfera Capital Agencia de Valores S.A.
- ♦ Administrative Assistant at Aebia Tecnología y Servicios
- ♦ Degree in Business Administration and Management from Rey Juan Carlos University
- ♦ Master's Degree in Tax Advisory at the Center for Financial Studies.
- ♦ European Investment Practitioner Certification from EFPA Spain

### Mr. García Bahillo, Luis Miguel

- ♦ Investment Manager at GPRA Capital
- ♦ Wealth Manager at GPM SV
- ♦ Instructor for Financial Advisory Courses
- ♦ Bachelor's in Economics from the Complutense University of Madrid



# 08 Certificate

This Executive Master's Degree in Financial Advisory guarantees students, in addition to the most rigorous and up-to-date education, access to a diploma for the Executive Master's Degree issued by TECH Global University.





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*Successfully complete this program and receive your university qualification without having to travel or fill out laborious paperwork”*



This private qualification from **TECH Global University** is a European continuing education and professional development program that guarantees the acquisition of competencies in its area of expertise, providing significant curricular value to the student who successfully completes the program.

## Accreditation/Membership

Modality: **online**

Duration: **12 months**

Accreditation: **60 ECTS**





## Executive Master's Degree Financial Advisory

- » Modality: online
- » Duration: 12 months
- » Certificate: TECH Global University
- » Accreditation: 60 ECTS
- » Schedule: at your own pace
- » Exams: online

# Executive Master's Degree Financial Advisory

Accreditation/Membership



Economics, Business  
and Enterprise Association

A background image of a man with a beard and glasses, wearing a dark suit and a white shirt, talking on a mobile phone. He is in an office setting with large windows in the background. The image is partially obscured by a large white diagonal shape that runs from the top right towards the bottom left.

**tech** global  
university