

Indigita published a new e-Learning refresher course on the essentials of MiFID II for financial intermediaries

Geneva, 8 May 2024 - **Indigita SA introduces a new MiFID II course tailored for banks and asset managers providing investment services or performing investment activities subject to MiFID II regulation. It enables participants to perfect their knowledge and skills regarding investor protection requirements and practices. The training is recognised by the SAQ Swiss Association for Quality.**

MiFID II, in force since January 2018, is a comprehensive directive established by the European Union. It primarily aims to achieve the following objectives:

- **Investor Protection:** It defines the operational conditions for investment firms to provide investment services with a key focus on ensuring robust investor protection;
- **Harmonize Regulatory Framework:** MiFID II seeks to harmonize the regulatory framework that governs investment services across the European Union, promoting consistency and fairness;
- **Boost Market Transparency:** By increasing transparency in the European securities market, MiFID II aims to bolster confidence, address areas previously unregulated, and ensure that supervisory authorities are equipped with sufficient powers to effectively perform their duties.

The course goes through each pillar of the regulation, including:

- **Client classification** to ensure that clients receive the appropriate level of protection and information;
- **Investor protection** to guarantee that financial intermediaries act in the best interests of clients;
- **Appropriateness** to assess whether the investment service or product is appropriate;
- **Suitability** to evaluate the client's knowledge, experience, financial situation, and investment objectives;
- **Product governance** to establish appropriate product distribution to end clients;
- **Transparency** and the enhanced reporting requirements.

Through interactive modules, participants will acquire theoretical knowledge and practical insights to better understand the organizational requirements around conflicts of interest, client asset protection, and product governance.

The e-Learning takes approximately 45 minutes to complete and concludes with a final assessment to validate participants' learning progress. Upon completion, participants will receive a certificate.

[Click here to try the DEMO version of the MiFID II Refresher course](#)

The e-Learning course is available as part of a corporate subscription or can be purchased by individual professionals directly through the Indigita e-Shop:

<https://e-shop.indigita.ch>

For more information about Indigita's MiFID II Refresher course:

<https://www.indigita.ch/mifid-2-refresher>

About Indigita SA

Indigita SA is a Swiss regulatory (regtech) company headquartered in Geneva, which provides a suite of interactive trainings, digital tools and APIs to support financial institutions and their employees to conduct cross-border business in a safe and compliant way. Indigita is the regtech arm of the BRP Group and combines the industry-leading regulatory knowledge of its mother company BRP Bizzozero & Partners SA and its sister company BRP Tax SA with innovative digital channels. Indigita provides banks and asset managers efficient access to the most complete and up-to-date collection of cross-border rules for more than 190 jurisdictions.

www.indigita.ch



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