

# Postgraduate Certificate

## Taxation of Financial Investments



## Postgraduate Certificate Taxation of Financial Investments

- » Modality: online
- » Duration: 6 weeks
- » Certificate: TECH Global University
- » Credits: 6 ECTS
- » Schedule: at your own pace
- » Exams: online
- » Target Group: University Graduates who have previously completed any of the degrees in the fields of Social and Legal Sciences, Administrative and Business Sciences

Website: [www.techtute.com/us/school-of-business/postgraduate-certificate/taxation-financial-investments](http://www.techtute.com/us/school-of-business/postgraduate-certificate/taxation-financial-investments)

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# 01 Welcome

In a fully globalized world, more and more companies are betting on international financial operations in order to maximize the benefits obtained from their activity. In order to undertake them properly, they need excellent specialists in the management of the taxation of transactions, with the idea of avoiding double taxation or excessive tax rates and optimizing the economic performance of the same. Consequently, TECH has designed this program, which enables students to delve into the tax characteristics of investments in Europe, Asia, the United States, or Latin America, acquiring skills that will boost their incursion into the top positions of leading multinational companies. In addition, you will achieve this learning following a 100% online methodology and without the obligation to adhere to pre-established schedules.



Postgraduate Certificate in Taxation of Financial Investments  
TECH Global University



“

*Through this program, you will identify the tax rates in different areas of Europe, Asia, or Latin America to optimize the economic performance of your international investments”*

02

# Why Study at TECH?

TECH is the world's largest 100% online business school. It is an elite business school, with a model based on the highest academic standards. A world-class center for intensive managerial skills education.



“

*TECH is a university at the forefront of technology, and puts all its resources at the student's disposal to help them achieve entrepreneurial success"*

## At TECH Global University



### Innovation

The university offers an online learning model that balances the latest educational technology with the most rigorous teaching methods. A unique method with the highest international recognition that will provide students with the keys to develop in a rapidly-evolving world, where innovation must be every entrepreneur's focus.

"*Microsoft Europe Success Story*", for integrating the innovative, interactive multi-video system.



### The Highest Standards

Admissions criteria at TECH are not economic. Students don't need to make a large investment to study at this university. However, in order to obtain a qualification from TECH, the student's intelligence and ability will be tested to their limits. The institution's academic standards are exceptionally high...

**95%** | of TECH students successfully complete their studies



### Networking

Professionals from countries all over the world attend TECH, allowing students to establish a large network of contacts that may prove useful to them in the future.

**+100000**

executives prepared each year

**+200**

different nationalities



### Empowerment

Students will grow hand in hand with the best companies and highly regarded and influential professionals. TECH has developed strategic partnerships and a valuable network of contacts with major economic players both in Europe and America.

**+500**

collaborative agreements with leading companies



### Talent

This program is a unique initiative to allow students to showcase their talent in the business world. An opportunity that will allow them to voice their concerns and share their business vision.

After completing this program, TECH helps students show the world their talent.



### Multicultural Context

While studying at TECH, students will enjoy a unique experience. Study in a multicultural context. In a program with a global vision, through which students can learn about the operating methods in different parts of the world, and gather the latest information that best adapts to their business idea.

TECH students represent more than 200 different nationalities.

TECH strives for excellence and, to this end, boasts a series of characteristics that make this university unique:



### Analysis

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TECH explores the student's critical side, their ability to question things, their problem-solving skills, as well as their interpersonal skills.



### Academic Excellence

---

TECH offers students the best online learning methodology. The university combines the Relearning methodology (the most internationally recognized postgraduate learning methodology) with Harvard Business School case studies. A complex balance of traditional and state-of-the-art methods, within the most demanding academic framework.



### Economy of Scale

---

TECH is the world's largest online university. It currently boasts a portfolio of more than 10,000 university postgraduate programs. And in today's new economy, **volume + technology = a ground-breaking price**. This way, TECH ensures that studying is not as expensive for students as it would be at another university.



### Learn with the best

---

In the classroom, TECH's teaching staff discuss how they have achieved success in their companies, working in a real, lively, and dynamic context. Teachers who are fully committed to offering a quality specialization that will allow students to advance in their career and stand out in the business world.

Teachers representing 20 different nationalities.



*At TECH, you will have access to the most rigorous and up-to-date case analyses in academia"*

03

# Why Our Program?

Studying this TECH program means increasing the chances of achieving professional success in senior business management.

It is a challenge that demands effort and dedication, but it opens the door to a promising future. Students will learn from the best teaching staff and with the most flexible and innovative educational methodology.



“

*We have highly qualified teachers and the most complete syllabus on the market, which allows us to offer you education of the highest academic level”*

This program will provide you with a multitude of professional and personal advantages, among which we highlight the following:

**01**

### A Strong Boost to Your Career

By studying at TECH, students will be able to take control of their future and develop their full potential. By completing this program, students will acquire the skills required to make a positive change in their career in a short period of time.

*70% of students achieve positive career development in less than 2 years.*

**02**

### Develop a strategic and global vision of the company

TECH offers an in-depth overview of general management to understand how each decision affects each of the company's different functional fields.

*Our global vision of companies will improve your strategic vision.*

**03**

### Consolidate the student's senior management skills

Studying at TECH means opening the doors to a wide range of professional opportunities for students to position themselves as senior executives, with a broad vision of the international environment.

*You will work on more than 100 real senior management cases.*

**04**

### You will take on new responsibilities

The program will cover the latest trends, advances and strategies, so that students can carry out their professional work in a changing environment.

*45% of graduates are promoted internally.*

05

### Access to a powerful network of contacts

TECH connects its students to maximize opportunities. Students with the same concerns and desire to grow. Therefore, partnerships, customers or suppliers can be shared.

*You will find a network of contacts that will be instrumental for professional development.*

06

### Thoroughly develop business projects.

Students will acquire a deep strategic vision that will help them develop their own project, taking into account the different fields in companies.

*20% of our students develop their own business idea.*

07

### Improve soft skills and management skills

TECH helps students apply and develop the knowledge they have acquired, while improving their interpersonal skills in order to become leaders who make a difference.

*Improve your communication and leadership skills and enhance your career.*

08

### You will be part of an exclusive community

Students will be part of a community of elite executives, large companies, renowned institutions, and qualified teachers from the most prestigious universities in the world: the TECH Global University community.

*We give you the opportunity to study with a team of world-renowned teachers.*

# 04 Objectives

This Postgraduate Certificate has been designed to increase the student's professional skills in the field of Taxation of Financial Investments. During this academic itinerary, you will delve into the tax rates and income from movable capital in different areas of Europe, the United States, Latin America, or Asia, as well as strategies to avoid double taxation. All this is guaranteed by the achievement of the different objectives that TECH has outlined for this program.



“

*Become an expert in the tax implications of investments in different countries around the world through this Postgraduate Certificate"*

**TECH makes the goals of their students their own goals too  
Working together to achieve them**

The **Postgraduate Certificate in Taxation of Financial Investments** will prepare the student to:

01

Analyze the tax framework and the taxation of different financial assets and products

02

Detect the tax peculiarities of investments in Europe and the U.S.

03

Delve into the tax characteristics of investments in Latin America





04

Know the tax rate applied to investments made in Asia

---

05

Determine the measures and advanced techniques for financial risk management using specific software for measuring financial variables

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06

Manage international double taxation deduction strategies for financial investments made in other countries

05

# Structure and Content

This program is taught in a 100% online mode, with the objective of allowing students to achieve effective learning through the development of their own study schedules. Likewise, all the didactic contents of the program are elaborated by excellent experts in the financial sector, so these specialists will have previously applied the knowledge you will receive in their professional experiences.



“

*The 100% online methodology of this program will allow you to study without the need to leave your own home”*

## Syllabus

The Postgraduate Certificate in Taxation of Financial Investments is a complete program that has been developed with the primary objective of providing the professional with the necessary skills to operate in complex and constantly changing environments. Upon completion, therefore, the student will be able to optimize decision-making in international financial investments, taking into account the aspects related to their taxation.

Throughout 180 hours of complete teaching, the student will have exquisite didactic content with a theoretical-practical character, which will strengthen their knowledge in the Taxation of Financial Investments field and allow them to understand the keys to success in real business cases.

This Postgraduate Certificate explores topics such as the global tax framework, the taxation of investments in different parts of Europe, and the tax particularities of operations in Latin America, among other issues. In this way, you will gain a deep understanding of this field and be prepared to apply what you have learned in your day-to-day professional life.

All this learning will be done through the complete educational methodology of Relearning, which allows students to learn at their own pace and without external teaching limitations. In addition, it will be guided by a first-class teaching staff and will have the most avant-garde didactic resources available in the educational market.

This Postgraduate Certificate is developed over 6 weeks and is divided into 1 module:

### Module 1.

### Investment taxation



### Where, When and How is it Taught?

TECH offers the possibility of developing this Postgraduate Certificate in Taxation of Financial Investments completely online. During the 6 weeks of the specialization, the student will be able to access all the contents of this program at any time, which will allow the students to self-manage their study time.

*A unique, key, and decisive educational experience to boost your professional development and make the definitive leap.*

**Module 1. Investment taxation**

**1.1. Global Tax Framework**

- 1.1.1. Income taxes
- 1.1.2. Corporate Income Tax
- 1.1.3. Indirect Taxes
- 1.1.4. Property tax
- 1.1.5. Excise Duties

**1.2. Taxation of Financial Operations**

- 1.2.1. Capital Income
- 1.2.2. Property alterations
- 1.2.3. Tax withholdings

**1.3. Taxation of savings**

- 1.3.1. Political considerations
- 1.3.2. Economical considerations
- 1.3.3. Financial considerations
- 1.3.4. Tax considerations
- 1.3.5. Social considerations

**1.4. Taxation of investments in Southern Europe**

- 1.4.1. Tax rate
- 1.4.2. Income from Movable Capital
- 1.4.3. Property alterations
- 1.4.4. Heritage

**1.5. Taxation of investments in rest of Europe**

- 1.5.1. Tax rate
- 1.5.2. Income from Movable Capital
- 1.5.3. Property alterations
- 1.5.4. Heritage

**1.6. Taxation of investments in Latin America**

- 1.6.1. Tax rate
- 1.6.2. Income from Movable Capital
- 1.6.3. Property alterations
- 1.6.4. Heritage

**1.7. Taxation of investments in Asia**

- 1.7.1. Tax rate
- 1.7.2. Income from Movable Capital
- 1.7.3. Property alterations
- 1.7.4. Heritage

**1.8. Taxation of investments in US**

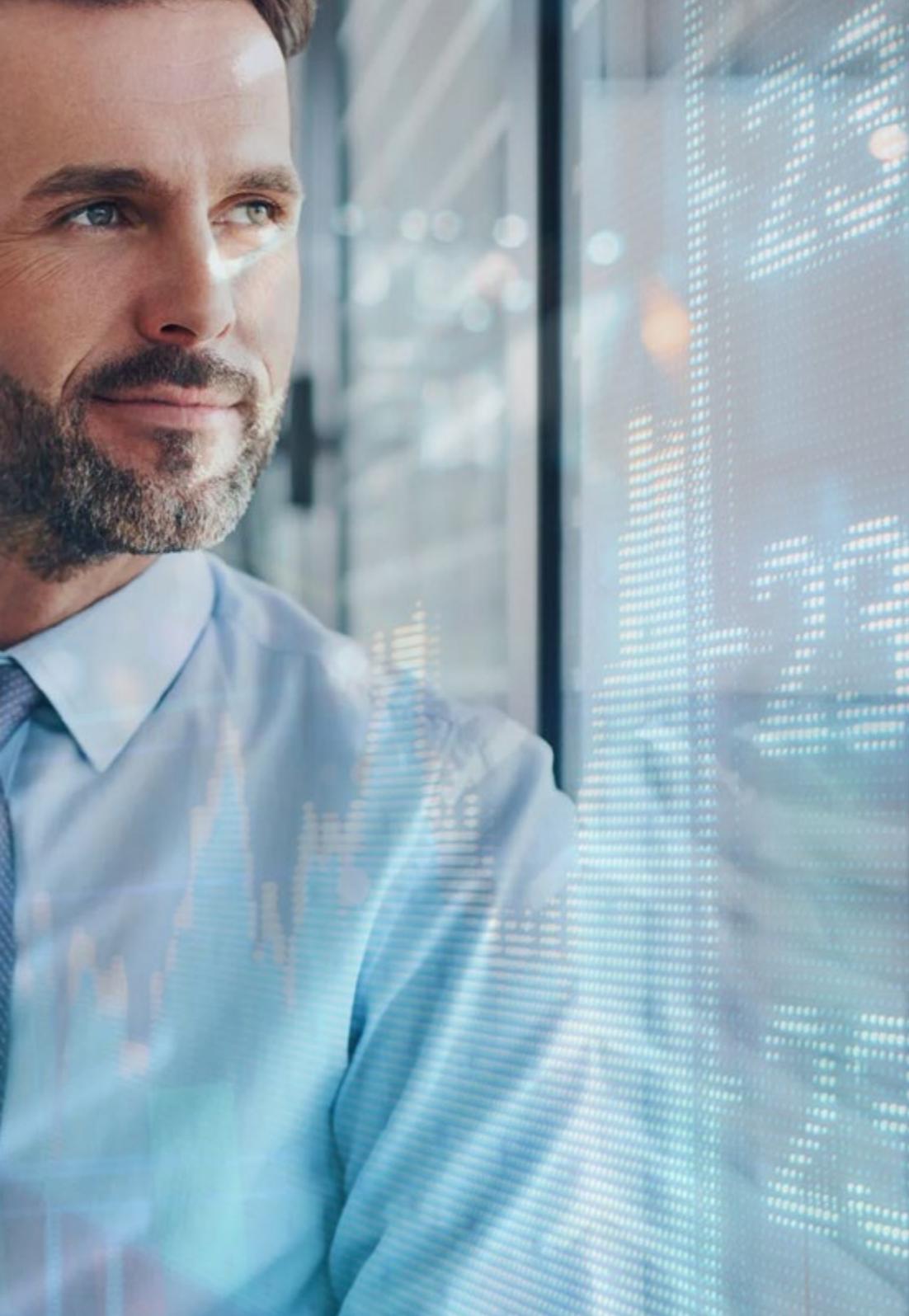
- 1.8.1. Tax rate
- 1.8.2. Income from Movable Capital
- 1.8.3. Property alterations
- 1.8.4. Heritage

**1.9. Double taxation**

- 1.9.1. How international double taxation works
- 1.9.2. Deduction for international double taxation
- 1.9.3. Countries with double taxation agreements

**1.10. Tax incentives**

- 1.10.1. Concept and examples
- 1.10.2. Concept of tax dumping
- 1.10.3. Tax Havens



“

*Choose those didactic formats that best suit your academic preferences, fully optimizing your learning process”*

# 06

# Methodology

This academic program offers students a different way of learning. Our methodology uses a cyclical learning approach: **Relearning**.

This teaching system is used, for example, in the most prestigious medical schools in the world, and major publications such as the **New England Journal of Medicine** have considered it to be one of the most effective.





“

*Discover Relearning, a system that abandons conventional linear learning, to take you through cyclical teaching systems: a way of learning that has proven to be extremely effective, especially in subjects that require memorization"*

## TECH Business School uses the Case Study to contextualize all content

Our program offers a revolutionary approach to developing skills and knowledge. Our goal is to strengthen skills in a changing, competitive, and highly demanding environment.

“

*At TECH, you will experience a learning methodology that is shaking the foundations of traditional universities around the world”*



*This program prepares you to face business challenges in uncertain environments and achieve business success.*



*Our program prepares you to face new challenges in uncertain environments and achieve success in your career.*

### A learning method that is different and innovative

This TECH program is an intensive educational program, created from scratch to present executives with challenges and business decisions at the highest level, whether at the national or international level. This methodology promotes personal and professional growth, representing a significant step towards success. The case method, a technique that lays the foundation for this content, ensures that the most current economic, social and business reality is taken into account.

“

*You will learn, through collaborative activities and real cases, how to solve complex situations in real business environments”*

The case method has been the most widely used learning system among the world's leading business schools for as long as they have existed. The case method was developed in 1912 so that law students would not only learn the law based on theoretical content. It consisted of presenting students with real-life, complex situations for them to make informed decisions and value judgments on how to resolve them. In 1924, Harvard adopted it as a standard teaching method.

What should a professional do in a given situation? This is the question we face in the case method, an action-oriented learning method. Throughout the program, the studies will be presented with multiple real cases. They must integrate all their knowledge, research, argue and defend their ideas and decisions.

## Relearning Methodology

TECH effectively combines the Case Study methodology with a 100% online learning system based on repetition, which combines different teaching elements in each lesson.

We enhance the Case Study with the best 100% online teaching method: Relearning.

*Our online system will allow you to organize your time and learning pace, adapting it to your schedule. You will be able to access the contents from any device with an internet connection.*

At TECH you will learn using a cutting-edge methodology designed to train the executives of the future. This method, at the forefront of international teaching, is called Relearning.

Our online business school is the only one in the world licensed to incorporate this successful method. In 2019, we managed to improve our students' overall satisfaction levels (teaching quality, quality of materials, course structure, objectives...) based on the best online university indicators.



In our program, learning is not a linear process, but rather a spiral (learn, unlearn, forget, and re-learn). Therefore, we combine each of these elements concentrically.

With this methodology we have trained more than 650,000 university graduates with unprecedented success in fields as diverse as biochemistry, genetics, surgery, international law, management skills, sports science, philosophy, law, engineering, journalism, history, markets, and financial instruments. All this in a highly demanding environment, where the students have a strong socio-economic profile and an average age of 43.5 years.

*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.*

From the latest scientific evidence in the field of neuroscience, not only do we know how to organize information, ideas, images and memories, but we know that the place and context where we have learned something is fundamental for us to be able to remember it and store it in the hippocampus, to retain it in our long-term memory.

In this way, and in what is called neurocognitive context-dependent e-learning, the different elements in our program are connected to the context where the individual carries out their professional activity.



This program offers the best educational material, prepared with professionals in mind:



### 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.

These contents are then applied to the audiovisual format, to create the TECH online working method. All this, with the latest techniques that offer high quality pieces in each and every one of the materials that are made available to the student.



### Classes

There is scientific evidence suggesting that observing third-party experts can be useful.

Learning from an Expert strengthens knowledge and memory, and generates confidence in future difficult decisions.



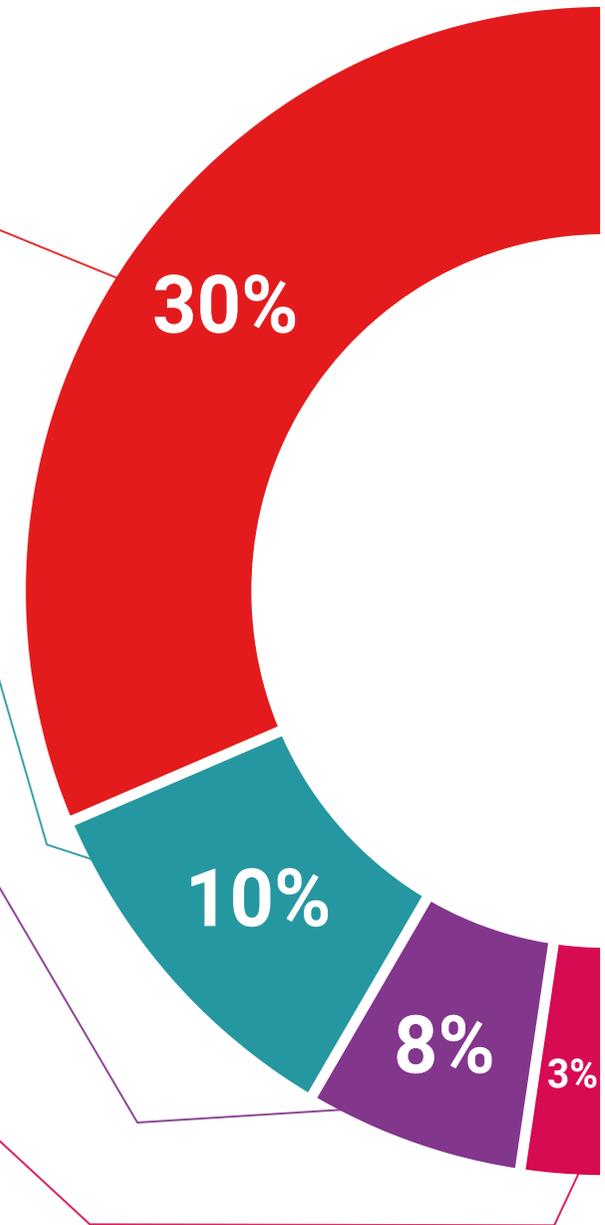
### Management Skills Exercises

They will carry out activities to develop specific executive competencies in each thematic area. Practices and dynamics to acquire and develop the skills and abilities that a high-level manager needs to develop in the context of the globalization we live in.



### Additional Reading

Recent articles, consensus documents and international guidelines, among others. In TECH's virtual library, students will have access to everything they need to complete their course.





### Case Studies

Students will complete a selection of the best case studies chosen specifically for this program. Cases that are presented, analyzed, and supervised by the best senior management specialists in the world.



### Interactive Summaries

The TECH team presents 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".



### Testing & Retesting

We periodically evaluate and re-evaluate students' knowledge throughout the program, through assessment and self-assessment activities and exercises, so that they can see how they are achieving their goals.



07

# Our Students' Profiles

The Postgraduate Certificate is aimed at graduates and university graduates who have previously completed any of the following degrees in the fields of Social and Legal Sciences, Administration, and Economics.

This program uses a multidisciplinary approach as the students have a diverse set of academic profiles and represent multiple nationalities.

The Postgraduate Certificate may also be taken by professionals who, being university graduates in any area, have two years of work experience in the field of Finance.





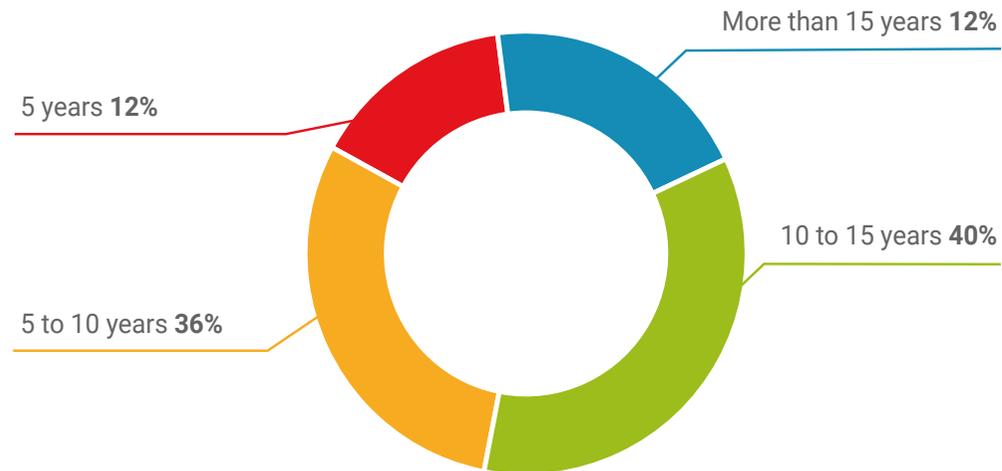
“

*If you are interested in developing professionally in the area of Taxation of Financial Investments in only 180 hours, this program is designed for you”*

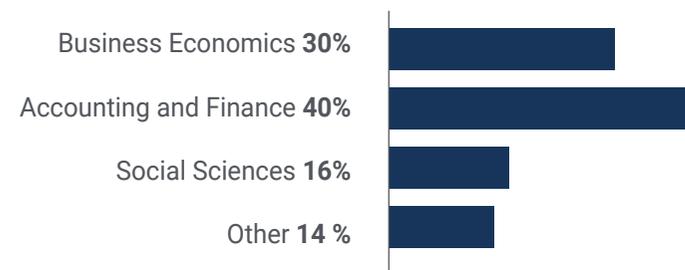
### Average Age

Between **35** and **45** years old

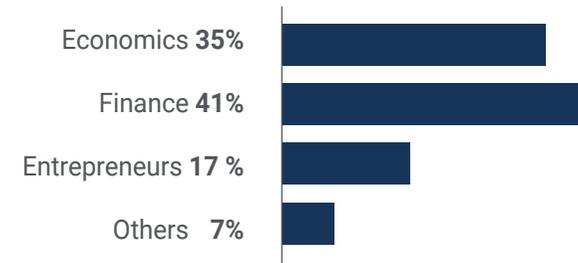
### Years of Experience



### Training

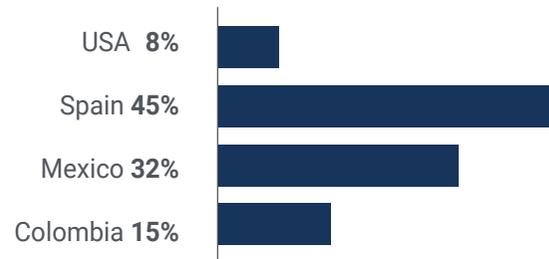


### Educational Profile



## Geographical Distribution

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## Marta González

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Director of Finance in a company

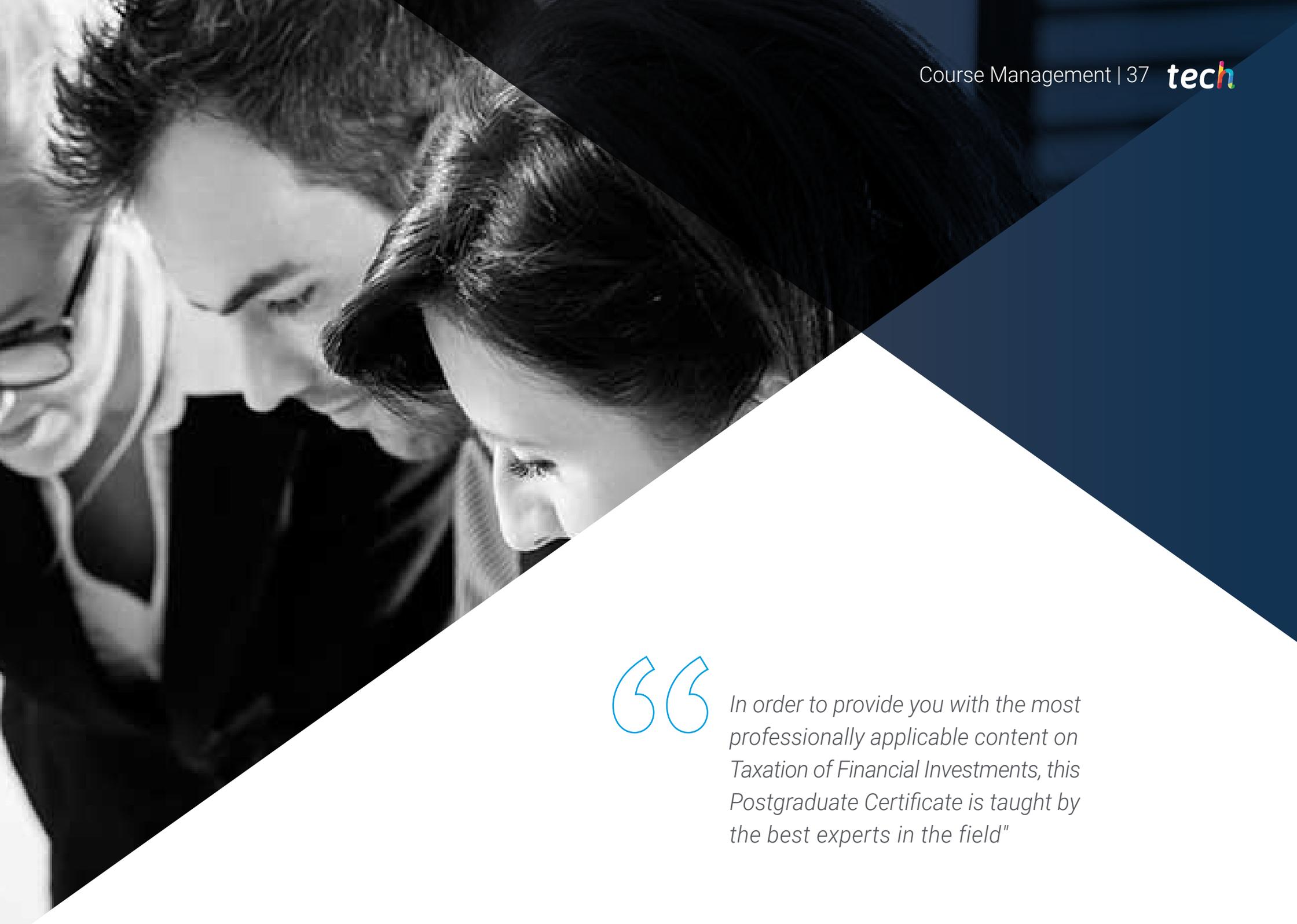
*"I developed my professional career in the area of Finance, managing my company's investments both nationally and internationally. Therefore, I decided to take this program with the idea of perfecting my skills in my field of work. The Postgraduate Certificate has exceeded all my expectations; I was delighted with all the knowledge acquired in these weeks"*

08

# Course Management

Thanks to TECH's tireless commitment to raising the academic quality of its programs to the highest level, this program has a teaching staff made up of the best specialists in the field of finance. All of them have held prestigious positions in companies belonging to different business sectors. Therefore, the knowledge that you will offer your students will be of great use in their day-to-day professional lives.





“

*In order to provide you with the most professionally applicable content on Taxation of Financial Investments, this Postgraduate Certificate is taught by the best experts in the field"*

## Management



### **Dr. Medrano García, María Luisa**

- ♦ Director of university graduate programs
- ♦ Technical advisor for public institutions
- ♦ Lecturer in university degrees, courses, and postgraduate programs
- ♦ Ph.D. in Senior Management from Universidad Rey Juan Carlos
- ♦ Degree in Business Administration and Management from Universidad Complutense de Madrid
- ♦ Research Award from the Economic and Social Council of the Community of Madrid



## Professors

### Dr. Gómez Martínez, Raúl

- ◆ Founding Partner and CEO of Open 4 Blockchain Fintech
- ◆ Founding partner of InvestMood Fintech
- ◆ General Manager of Apara
- ◆ Consultant for financial institutions
- ◆ Lecturer in undergraduate and postgraduate university programs
- ◆ Doctorate in Business Economics and Finance from Universidad Rey Juan Carlos de Madrid
- ◆ Master's Degree in Economic Analysis and Financial Economics from the Complutense University of Madrid
- ◆ Degree in Economics and Business Administration from Universidad Complutense de Madrid

### Mr. Blanco Garnacho, Marcelino

- ◆ Director of Wealth Planning at Andbank
- ◆ Head of Wealth Advisory at Mirabaud Finanzas
- ◆ Director of Wealth Advisory Services at Bankia
- ◆ Director of Tax Advisory at Altae Banco
- ◆ Lecturer in postgraduate university studies
- ◆ Master's Degree in Tax Advice from the Instituto de Empresa
- ◆ Degree in Economics from Universidad Complutense de Madrid

09

# Impact on Your Career

The Postgraduate Certificate in Taxation of Financial Investments is a program designed to provide students with skills that will allow them to progress in their professional careers. In this way, they will increase their opportunities to access excellent jobs, significantly improving their professional and economic conditions.





“

*This academic institution lays the foundation for your professional growth in the financial field"*

## Are you ready to take the leap? Excellent professional development awaits you

TECH's Postgraduate Certificate in Taxation of Financial Investments is an intensive program that prepares you to face challenges and business decisions in the field of Finance. The main objective is to promote your personal and professional growth. Helping you achieve success.

If you want to improve yourself, make a positive change at a professional level, and network with the best, then this is the place for you.

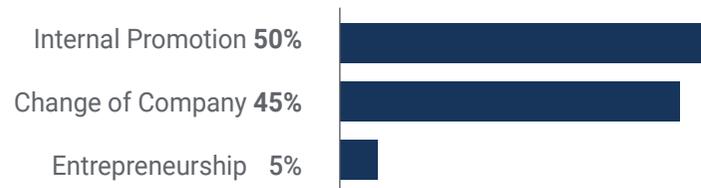
*Perfect your career prospects in a very short time frame"*

*Acquire the best skills in Taxation of Financial Investments in only 6 weeks and grow professionally in this sector"*

### Time of Change



### Type of Change



### Salary increase

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This program represents a salary increase of more than **25%** for our students



10

# Benefits for Your Company

This Postgraduate Certificate has been developed with the aim of providing students with the best competencies in Taxation of Financial Investments, in order to instruct professionals who will help to raise the level of organizations. Through the program, you will be integrated into a global network that will allow you to deal with future suppliers, partners, or clients, therefore, enriching your business vision.



“

*The Taxation of Financial Investments specialist is a crucial professional to extract the maximum yield from international economic operations"*

Developing and retaining talent in companies is the best long-term investment.

01

### **Growth of talent and intellectual capital**

The professional will introduce the company to new concepts, strategies, and perspectives that can bring about significant changes in the organization.

---

02

### **Retaining high-potential executives to avoid talent drain**

This program strengthens the link between the company and the professional and opens new avenues for professional growth within the company.

03

### **Building agents of change**

You will be able to make decisions in times of uncertainty and crisis, helping the organization overcome obstacles.

---

04

### **Increased international expansion possibilities**

Thanks to this program, the company will come into contact with the main markets in the world economy.



05

### **Project Development**

The professional can work on a real project or develop new projects in the field of R & D or business development of your company.

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06

### **Increased competitiveness**

This program will equip students with the skills to take on new challenges and drive the organization forward.

# 11

# Certificate

The Postgraduate Certificate in Taxation of Financial Investments guarantees, in addition to the most rigorous and updated training, access to a Postgraduate Certificate issued by TECH Global University.



“

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

This program will allow you to obtain your **Postgraduate Certificate in Taxation of Financial Investments** endorsed by **TECH Global University**, the world's largest online university.

**TECH Global University** is an official European University publicly recognized by the Government of Andorra ([official bulletin](#)). Andorra is part of the European Higher Education Area (EHEA) since 2003. The EHEA is an initiative promoted by the European Union that aims to organize the international training framework and harmonize the higher education systems of the member countries of this space. The project promotes common values, the implementation of collaborative tools and strengthening its quality assurance mechanisms to enhance collaboration and mobility among students, researchers and academics.

This **TECH Global University** title is a European program of continuing education and professional updating that guarantees the acquisition of competencies in its area of knowledge, providing a high curricular value to the student who completes the program.

Title: **Postgraduate Certificate in Taxation of Financial Investments**

Modality: **online**

Duration: **6 weeks**

Accreditation: **6 ECTS**





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