



Postgraduate Diploma

Financial Marketing

» Modality: online

» Duration: 6 months

» Certificate: TECH Global University

» Credits: 15 ECTS

» Schedule: at your own pace

» Exams: online

Website: www.techtitute.com/us/school-of-business/postgraduate-diploma/postgraduate-diploma-financial-marketing

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Certificate

01 Welcome

In the financial sector, marketing has become increasingly important over the years. As the public's perception of banking has changed, the messages and the way of connecting with the audience have also evolved, adapting to the new type of financial consumer. In order to prepare students for the changes that have taken place in Financial Marketing and, at the same time, provide them with knowledge that will boost their career, TECH has developed the following degree program. With this specialization, the student is increasing their future possibilities to access more relevant positions or increase their salary.









tech 08 | Why Study at TECH?

At TECH Global University



Innovation

The university offers an online learning model that combines 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.

100,000+

200+

executives trained each year

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 in 7 continents.

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.





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 studies in the academic community"

Why Study at TECH? | 09 **tech**

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



Analysis

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 method (a postgraduate learning methodology with the highest international rating) with the Case Study. A complex balance between tradition and state-of-the-art, within the context of the most demanding academic itinerary.



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.





tech 12 | Why Our Program?

This program will provide students with a multitude of professional and personal advantages, particularly the following:



A significant career boost

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 participants achieve positive career development in less than 2 years.



Develop a strategic and global vision of companies

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

Our global vision of companies will improve your strategic vision.



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.



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.



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.



Thoroughly develop business projects

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

20% of our students develop their own business idea.



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.



Be part of an exclusive community

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

We give you the opportunity to train with a team of world renowned teachers.





tech 16 | Objectives

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

The **Postgraduate Diploma in Financial Marketing** trains students to:



Develop customer-oriented strategies, thinking and acting in a harmonized way, where the customer and the distribution channel are the focus of the financial institution's attention



Formulate short-, medium- and long-term business plans for the office network, so that decisions can be made systematically and in a structured manner with respect to the company's strategy





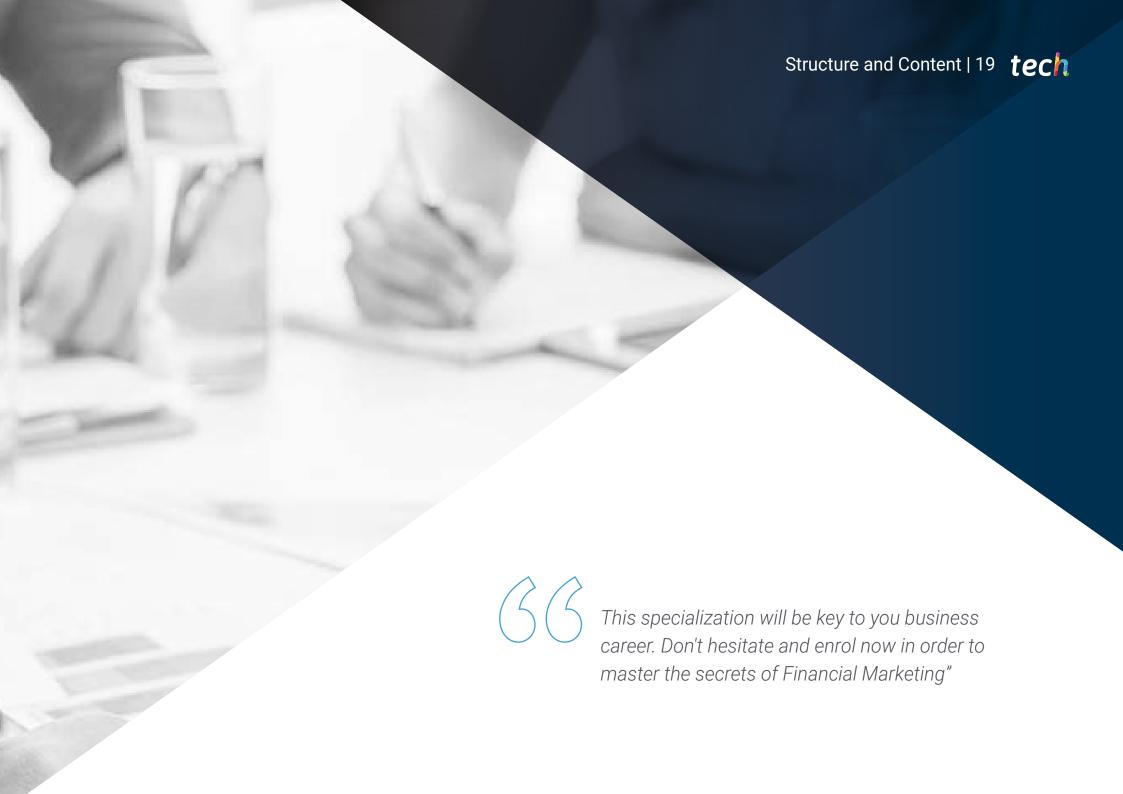


Perform different economic, financial and strategic analyses of a company and its comparison with the main competitors and new business models



Define the management information relevant to the tactical and strategic monitoring of a credit institution





tech 20 | Structure and Content

Syllabus

All the content offered in this Postgraduate Diploma has been created following the highest educational standard at TECH, guaranteeing that the student has access to first class reading material.

During the 375 hours of the program, the teaching staff presents students with practical cases in the field of Financial Marketing in which, using the knowledge acquired in the program, complex situations are solved. Thanks to this, the student obtains a contextual teaching, using the marketing techniques in their own work from the very moment of the course.

A syllabus that is focused on the professional needs of the students, with the possibility to completely adapt the study of the content to their own rhythm of life. This is achieved thanks to reduced reading load, supported by audiovisual material and without the need to complete an final project piece of work.

This Postgraduate Diploma takes place over 6 months and is divided into 4 modules:

Module 1.	The Economic Environment and Financial Markets
Module 2.	Financial Products and Banking Asset Products
Module 3.	Collective Investment
Module 4.	Financial Marketing



Where, When and How is it Taught?

TECH offers the possibility of taking this program completely online. Throughout the 6 months of training, you will be able to access all the contents of this program at any time, allowing you to self-manage your study time.

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

tech 22 | Structure and Content

Mod	ule 1. The Economic Environment and	Finan	cial Markets				
1.1.1. 1.1.2. 1.1.3. 1.1.4.	Fundamentals of Banking and Finance Fundamentals of Banking and Finance Fundamental Variables in Financial Decisions Financial Activity Banking Within the Financial System The Banking Business	1.2. 1.2.1. 1.2.2. 1.2.3.	Mathematics of Financial Operations	1.3.1. 1.3.2. 1.3.3.	Macroeconomics and Monetary Policy GDP Financial Balance The Role of the Public Sector Monetary Policy and Fiscal Policy	1.4.1. 1.4.2.	Measuring Financial Activity Financial System Types of Transactions Financial Instruments
	Main Financial Aggregates Financial Institutions Financial Versus Non-Financial Investment Negotiation Levels	1.6.2. 1.6.3.	Markets and the Control of Financial Flows Structure of the Financial System Financial Markets Nature and Objectives of Monetary Policy Interest Rates	1.7. 1.7.1. 1.7.2. 1.7.3. 1.7.4.	Bank Accounting Financial Statements in Banking Other Balance Sheet and Income Statement Items Credit Risk and Insolvency Business Combinations and Consolidation	1.8.2. 1.8.3.	The Current Financial Crisis Failures of the International Financial System Accounting Standards and Creative Accounting Bad Banking Practices Tax Havens
Mod	l ule 2. Financial Products and Banking	Asset	Products				
2.1. 2.1.1. 2.1.2. 2.1.3.		2.2. 2.2.1. 2.2.2. 2.2.3.		2.3. 2.3.1. 2.3.2. 2.3.3. 2.3.4.	Derivative Financial Products Short-Term Derivative Products Options Swaps Credit Derivatives	2.4.1. 2.4.2. 2.4.3.	Structured Financial Products Structured Interest Rate Swaps Structured Exchange Rate Structured Equity Securities "Commodities" Structures
	Bank Loans to Individuals Analysis of Effective Rates Financial Characteristics Legal Characteristics	2.6.2.	Corporate Banking Asset Products Bank Discount Credit Policies Credit Anticypes	2.7. 2.7.1. 2.7.2. 2.7.3.	Mortgage Loans Appraisals Mortgage Subrogation Mortgage Novations	2.8.1.	Working Capital Financing Products Factoring Confirming
2.9.2.	Insurance Products Models and Characteristics Regulation and Tax Treatment of Pension Funds and Plans Marketing of Insurance Products from Credit Institutions	2.10.1 2.10.2 2.10.3	Liability Products Remuneration and Profitability APR Legal and Tax Aspects Target Audience				

4.8.3. Brand Equity

Module 3. Collective Investment			
3.1. Investment Funds3.1.1. Manager and Depositary3.1.2. Investment Funds3.1.3. Supervision3.1.4. Characteristics of the Funds	 3.2. Equity Management 3.2.1. Analysis of Investment Funds 3.2.2. Equity Management Tools 3.2.3. Analysis of a Portfolio of Financial Asset 3.2.4. Reinstatement of Truncated Financial Investments 	3.3. Asset Allocation 3.3.1. Portfolio Advisory Process 3.3.2. Strategic and Tactical Asset Allocation 3.3.3. Institutional Manager 3.3.4. Strategic Portfolio and Tactical Portfolio	 3.4. Portfolio Building 3.4.1. Market Risk 3.4.2. International Investment 3.4.3. Asset Classes, Utility Curves and CAMP 3.4.4. Portfolio Formation Strategies
 3.5. Equity Management Strategies 3.5.1. Markowitz Portfolio Selection Theory 3.5.2. Systematic and Specific Risks 3.5.3. Financial Crisis Management 3.5.4. Portfolio Management in Emerging Markets 	 3.6. Fixed Income Management Strategies 3.6.1. Fixed Income Portfolio Management 3.6.2. Hedging in Fixed Income Portfolios 3.6.3. Securitizations 	 3.7. Insurance 3.7.1. Fundamentals of the Insurance Activity 3.7.2. Unit Linked, Coinsurance and Reinsurance 3.7.3. Insurance Sector Institutions 3.7.4. Insurance Companies and Mutual Insurance Companies 	3.8. Taxation 3.8.1. Taxation of Financial Products 3.8.2. Taxation of Social Security Products 3.8.3. Spanish Tax Framework
Module 4. Financial Marketing			
 4.1. Bank Office Market Research 4.1.1. Specific Aspects of Financial Services Marketing 4.1.2. Determining Factors When Choosing a Bank 4.1.3. Development of New Banking Products and Services 4.1.4. Tools for Bank Marketing Research 	 4.2. Sales and Communication Techniques 4.2.1. Notions of Psychology Applied to Sales 4.2.2. Techniques to Improve Verbal and Non-Verbal Communication 4.4.3. Negotiation Tactics 4.4.4. Closing and Customer Commitment 	 4.3. Financial Marketing Plan 4.3.1. Pricing of Banking Products 4.3.2. Product Promotion and Advertising Campaigns 4.3.3. Distribution Systems Used in Financial Services Marketing 4.3.4. Segmentation, Targeting, and Positioning 	 4.4. New Strategies for Sales Growth and Cost Savings 4.4.1. Electronic Banking 4.4.2. CRM (Customer Relationship Management) 4.4.3. Cross-Selling and Up-Selling
 4.5. Relationship Marketing 4.5.1. Customer Development and Loyalty 4.5.2. Marketing Tools for Customer Loyalty and 	4.6. Inbound Marketing in the Bankin Sector4.6.1. Effective Inbound Marketing	4.7. Developing E-mail Campaigns 4.7.1. Designing E-Mail Marketing Campaigns 4.7.2. E-mail Marketing	 4.8. Corporate Branding 4.8.1. Brand Evolution 4.8.2. Creating and Developing a Successful Brand 4.8.2. Brand Equity

4.7.3. Lists of Subscribers, Leads, and Customers

4.6.1. Effective Inbound Marketing4.6.2. The Benefits of Inbound Marketing4.6.3. Measuring the Success of Inbound

Marketing

Retention

4.5.3. Customer Retention Strategies



This training program offers 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.



tech 26 | Methodology

At TECH Business School we use the Harvard case method

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



At TECH, you will experience a way of learning that is shaking the foundations of traditional universities around the world"



We are the first online university to combine Harvard Business School case studies with a 100% online learning system based on repetition.



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 intensive program from TECH Global University School of Business prepares students to face all the challenges in this area, both nationally and internationally. We are committed to promoting personal and professional growth, the best way to strive for success, that is why TECH uses Harvard case studies, with which we have a strategic agreement that allows us to provide our students with material from the best university the world.



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

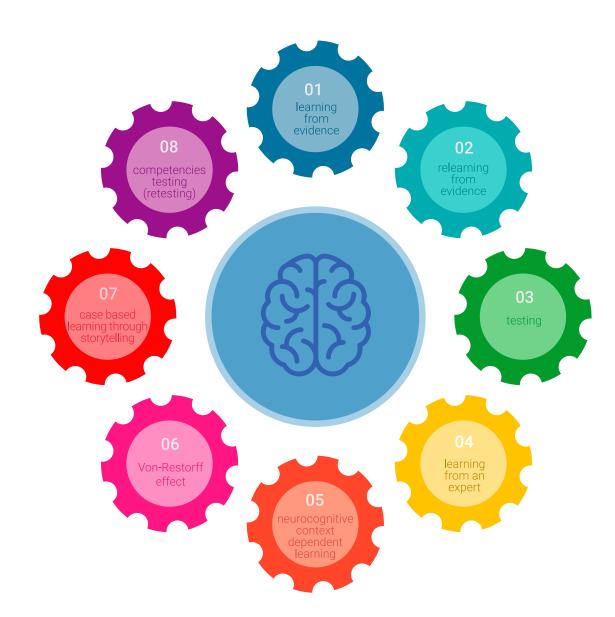
Our university is the first in the world to combine Harvard University case studies with a 100% online learning system based on repetition, which combines different teaching elements in each lesson.

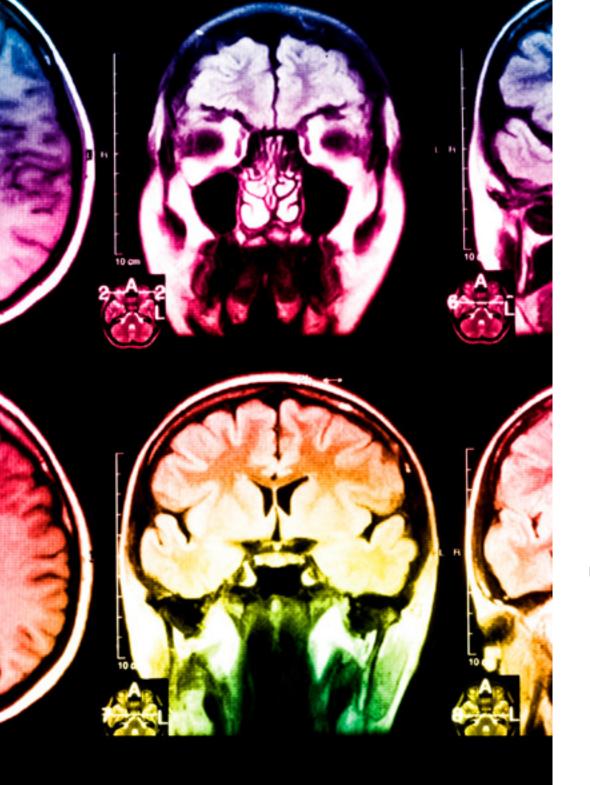
We enhance Harvard case studies with the best 100% online teaching method: Relearning.

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.





Methodology | 29 **tech**

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.



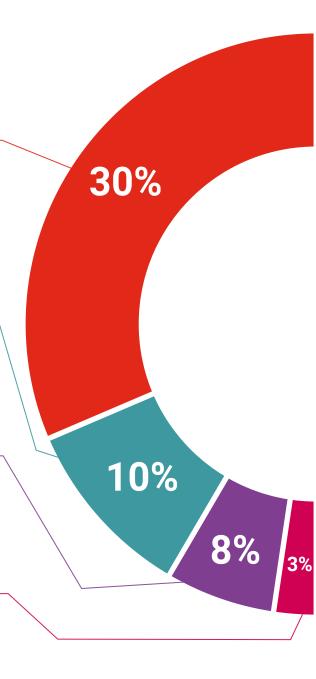
Management Skills Exercises

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.





They will complete a selection of the best business cases used at Harvard Business School. Cases that are presented, analyzed, and supervised by the best senior management specialists in Latin America.



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.

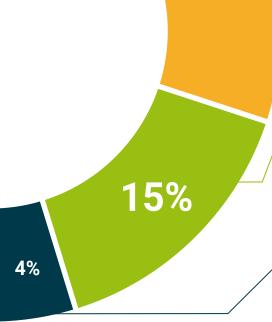


This exclusive multimedia content presentation training Exclusive system was awarded by Microsoft as a "European Success Story".

Testing & Retesting

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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 your goals.

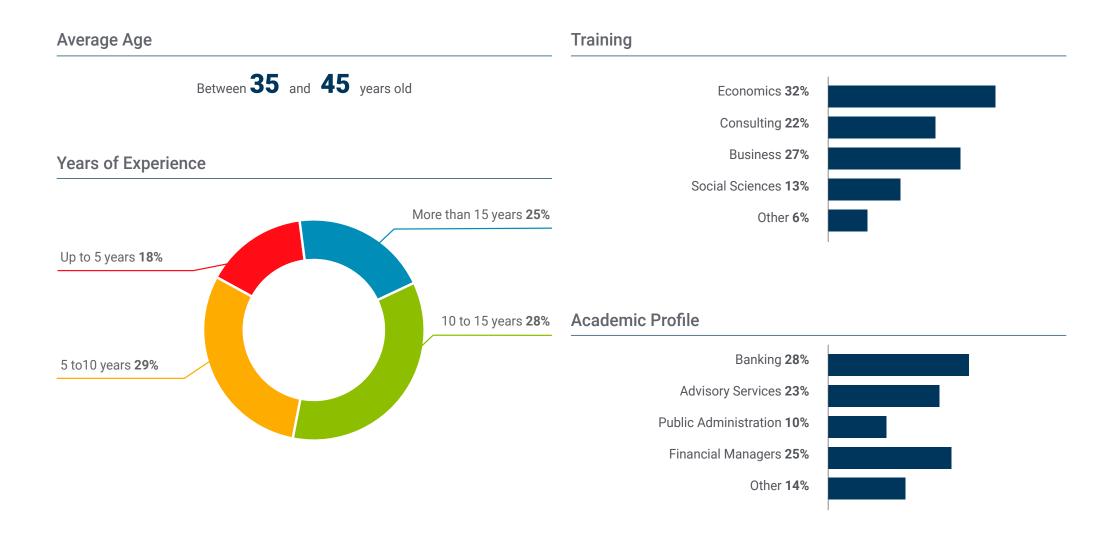


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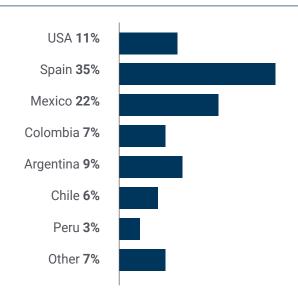


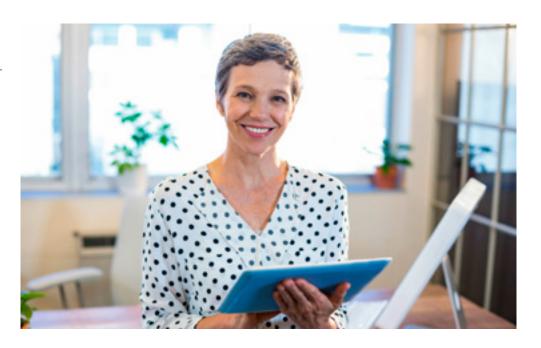


tech 34 | Our Students' Profiles



Geographical Distribution





Paula Ramos

Financial Manager

"I knew that I wanted to specialize in the financial field, but I wasn't sure in which branch to do so. Fortunately, I made no mistake in choosing this TECH Postgraduate Diploma, which gave me the necessary marketing keys to successfully opt for my current position as financial director"





International Guest Director

Erdi Karaca is a prominent leader in banking and financial product development, specialized in digital strategies, data and Artificial Intelligence. With a focus on creating innovative solutions, he has contributed to the advancement of digital banking and the implementation of emerging technologies in the financial sector. In fact, his interests include the integration of AI to improve customer experience and the optimization of banking processes, as well as the design of strategies for banking products.

Throughout his career, he has held leadership positions in global institutions such as HSBC Kinetic, where he has worked as Head of Mobile Banking and Co-Head of Business Banking, where he has led teams in the development of HSBC Kinetic and mobile services for business banking in the United Kingdom. In addition, his management has focused on the creation of innovative digital products, such as payment solutions, cards, loans and financial management tools. He has also been Head of Banking and Beyond Banking, where he has overseen projects that have transformed SME banking through digital products.

Internationally, Erdi Karaca has been recognized for his ability to lead complex teams and develop strategies that have driven innovation in digital banking. He has led global programs that have promoted smart banking and technology integration in diverse markets. His work has been instrumental in the implementation of Al-driven smart banking solutions and in the management of financial products for business customers globally. He has also contributed to the research of multiple products for the financial sector, publishing articles on the implementation of Al in banking, as well as presenting his work at international conferences.



Mr. Karaca, Erdi

- · Head of Mobile Banking at HSBC Kinetic, London, United Kingdom
- Co-Head of Enterprise Banking at HSBC Kinetic
- · Head of Banking and Beyond Banking at HSBC Kinetic
- CDO of Global Commercial Banking at HSBC Kinetic Innovation, Strategy and
- Innovation in Commercial Banking at NatWest Group
- Digital Strategy and Product Development Manager at NatWest Group
- Master in Business from Oxford University
- Course in Artificial Intelligence: Implications for Business Strategy from the MIT Sloan School of Management
- Master's Degree in International Politics from the University of Surrey
- Bachelor of Arts in Social Sciences from Oxford Technical College



Thanks to TECH, you will be able to learn with the best professionals in the world"

tech 40 | Course Management

Management



Mr. Domingo Folgado, Javier

- Head of the Department of Corporate Development & Investor Relations. WHITE Investing. Valencia Since 2018
- Founding Member of Relianze Valencia Since 2014
- Degree in Economics and Business Sciences, with a major in Finance and Investments University of Economics and Business Sciences Valencia 1995
- Master's Degree in Portfolio Management. Institute of Advanced Finance Madrid. 1999
- Specialist Postgraduate Certificate Financial and Economic Management Pontific University of Comillas ICADE Madrid. 1996
- Training in Market Risk Control (VaR) and Credit Risk (Credit Derivatives). Options & Futures Institute. 2000
- Training in Corporate Finance Applied Finances Institute (AFI) Madrid. 2000
- Professor of different finance schools in Spain For 20 years







tech 44 | Impact on Your Career

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

The Postgraduate Diploma in Financial Marketing at TECH Global University is an intensive program that prepares students for the most exciting challenges of the business world in financial marketing. Thus, the student will graduate prepared to face the highest level of management of any financial company they wish.

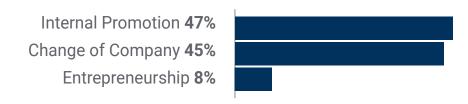
Don't miss the opportunity to train with us and you will find the career boost you were looking for.

If you want to make a positive change in your profession, the Postgraduate Diploma in Financial Marketing will help you achieve it.

When the change occurs



Type of change



Salary increase

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

\$57,900

A salary increase of

25.22%

\$72,500





tech 48 | Benefits for Your Company

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



Intellectual Capital and Talent Growth

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



Retaining high-potential executives to avoid talent drain

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



Building Agents of Change

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



Increased International Expansion Possibilities

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





Project Development

The manager can work on a current project or develop new projects in the field of R&D or Business Development within their company.



Increased Competitiveness

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







tech 52 | Certificate

This program will allow you to obtain your **Postgraduate Diploma in Financial Marketing** 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 quarantees the acquisition of competencies in its area of knowledge, providing a high curricular value to the student who completes the program.

Title: Postgraduate Diploma in Financial Marketing

Modality: online

Duration: 6 months

Accreditation: 15 ECTS



and an end date of dd/mm/yyyy.

TECH Global University is a university officially recognized by the Government of Andorra on the 31st of January of 2024, which belongs to the European Higher Education Area (EHEA).

In Andorra la Vella, on the 28th of February of 2024



^{*}Apostille Convention. In the event that the student wishes to have their paper diploma issued with an apostille, TECH Global University will make the necessary arrangements to obtain it, at an additional cost.



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