

DAPS

Doctorate of Advanced Professional Studies
Doctorat professionnel de formation continue

Professional Doctorate in **Applied Finance**

Octobre 2023 > August 2026

Specialisation in Sustainable Assets and Wealth Management



GENEVA FINANCE RESEARCH INSTITUTE | GFRI

GENEVA INSTITUTE FOR WEALTH MANAGEMENT | GIWM



**UNIVERSITÉ
DE GENÈVE**



Direction

- **Prof. Rajna Gibson Brandon**, Professor of Finance, Geneva Finance Research Institute, University of Geneva, Co-Director of the DAPS and Managing Director of the GIWM
- **Mr. Jun Yan**, President, China Global Philanthropy Institute, Co-Director of the DAPS

Steering Committee

- **Prof. Rajna Gibson Brandon**, Professor of Finance, Geneva Finance Research Institute, University of Geneva, Co-Director of the DAPS and Managing Director of the GIWM
- **Mr. Jun Yan**, President, China Global Philanthropy Institute, Co-Director of the DAPS
- **Prof. Tony Berrada**, Professor of Finance, Geneva Finance Research Institute, University of Geneva, Switzerland
- **Prof. Weihua Ma**, Professor and Chairman of the Board, China Global Philanthropy Institute, and Professor, Peking University and Tsinghua University

The Steering Committee works in consultation with professional partners and external stakeholders to ensure the relevance of the programme. It benefits from the administrative support of the Geneva Institute for Wealth Management (GIWM).

The University of Geneva collaborates with China Global Philanthropy Institute (CGPI), a non-profit educational organisation and the first independently registered institute in China. CGPI provides executive education and postgraduate education in philanthropy and social entrepreneurship related disciplines, and it supports philanthropists, practitioners, and social entrepreneurs to achieve sustainable impact.

Coordination

Marylaure Bloch, University of Geneva and GIWM



The DAPS in Applied Finance is a three-year high-level executive programme which aims to train entrepreneurs, investors and senior managers in analysing, anticipating, and conducting scientifically applied research in the field of sustainable assets and wealth management.

The Doctorate of Advanced Professional Studies in Applied Finance capitalizes on the worldwide recognition of Geneva as a centre of Wealth Management to offer a unique specialisation to train the wealth management professionals of tomorrow with a special emphasis on sustainability issues.

By engaging in applied research, the programme aims to train participants to become thought-leaders and highly competent professionals in sustainable assets and wealth management practices.

The three-year high-level executive programme is delivered by the Geneva Finance Research Institute (GFRI), a centre of excellence in interdisciplinary research and teaching in Finance and a world leading centre in Sustainable Finance, in collaboration with the Geneva Institute for Wealth Management (GIWM), a non-profit Swiss foundation dedicated to promoting high-level executive education in finance and with the China Global Philanthropy Institute (CGPI). Consisting of ten modules taught by renowned professors and professionals in finance and law from Switzerland and China, the programme provides academic excellence in the field of wealth management, a leading activity of the financial industry.

The programme aims to develop reflective practitioners with the potential to become experts in sustainable asset and wealth management practices, so that they become more proficient at managing within complex and increasingly competitive environments with a sustainable focus. It supports entrepreneurs, investors and senior managers in analysing, anticipating and conducting scientifically applied research in sustainable wealth management in innovative and rigorous ways.

Prospective graduates will benefit from solid knowledge in the fields of financial markets, international portfolio management, sustainable finance, social entrepreneurship, risk management, quantitative and qualitative methods of finance, along with analysis and modelling methods that will enable them to meet the challenges faced by companies in an increasingly uncertain and globalised environments.



Audience

Entrepreneurs, venture capitalists, senior executives, public officials and managers who want to learn about the latest academic and professional advances in finance, to understand and develop wealth management strategies that will consolidate their clients' prosperity while maintaining their sense of purpose.

Objectives

- Sharpen and broaden skills in wealth management and sustainable finance.
- Understand the current and future evolution of financial markets.
- Becoming responsible investors who care about environmental and social challenges.
- Face an increasingly competitive, globalised and uncertain world.

Learning Outcomes

By the end of this programme, the participants will:

- Master advanced conceptual and quantitative methods and have financial expertise, specifically in Sustainable Wealth Management.
- Gain a deep understanding of banking, financial markets, as well as traditional, alternative, and sustainable investments.
- Acquire evidence-based scientific research skills in the context of writing a professional doctoral thesis with academic integrity, focusing on some of the most innovative topics in Wealth Management and Sustainable Assets.
- Develop advanced written and oral communication skills, in particular through the writing and defence of their dissertation in Applied Finance.



Learning Methods

- Interactive teaching methods and access to cutting-edge applied research.
- Real-data and real-time analytic tools supported by an intuitive online platform.
- Exchanges with both academics and practitioners.
- Study trip and networking opportunities.
- Research and writing of a professional doctoral thesis.

Programme Structure

The programme is organised into 10 thematic modules (50 ECTS credits), 1 methodological module (5 ECTS credits) and the writing of a thesis in applied finance research (25 ECTS credits). While classes are taught in Mandarin and in English, the professional dissertation is written in English.

We offer an immersion into the Private Banking world with a Geneva Study Tour of one week that combines lectures in Private Banking with visits of some of the most prestigious financial institutions located in Geneva, including: Banque Edmond de Rothschild, BCGE, Julius Bär, Lombard Odier, Mirabaud, PwC, Swiss National Bank, UBS, and also Family Offices and Fintech companies, as well as opportunities to network with Swiss financial professionals.



Programme

Module 1 |

Global Asset Allocation & Management

4 days | 5 ECTS Credits

University of Geneva

Prof. Tony Berrada (UNIGE) • **Prof. Inès Chaieb** (UNIGE)

Module 2 |

Social Entrepreneurship & Technology Innovation

4 days | 5 ECTS Credits

China Global Philanthropy Institute

Prof. Xiqing Gao (CGPI & UIBE) • **Dr. Meilun Shi** (HKEX) •
Dr. Jie He (Shenzhen Municipal Bureau of Local Financial
Regulation and Supervision) • **Prof. Han Shi** (HKUST &
HKU)

Module 3 |

Sustainable Finance

4 days | 5 ECTS Credits

University of Geneva

Prof. Philipp Krueger (UNIGE) • **Dr. Ernst von Kimakovitz**
(UNILU)

Module 4 |

Risk Management in Finance

4 days | 5 ECTS Credits

University of Geneva

Dr. Michel Crouhy (Natixis) • **Prof. Dan Galai** (HUJI) • **Prof.**
Olivier Scaillet (UNIGE) • **Prof. Fabio Trojani** (UNIGE)



Module 5 |

Philanthropic Trusts & Foundation Management

4 days | 5 ECTS Credits

China Global Philanthropy Institute

Prof. Yueguan Chen (CGPI & Tsinghua) • **Prof. Haoming Huang** (CGPI & Tsinghua) • **Dr. Guoke He** (Zhicheng Law Firm) • **Dr. Guihuan Cai** (PBCSF)

Module 6 |

Alternative Investments

4 days | 5 ECTS Credits

University of Geneva

Prof. Rajna Gibson Brandon (UNIGE) • **Prof. Harald Hau** (UNIGE) • **Prof. Martin Hoesli** (UNIGE) • **Prof. Jean-Charles Rochet** (UNIGE)

Module 7 |

Strategic Transition & Business for Good

4 days | 5 ECTS Credits

China Global Philanthropy Institute

Prof. Jisi Wang (PKU) • **Prof. Min Tang** (China Social Entrepreneur Foundation) • **Mr. Zhigang Wang** (Zhigang Think Tank)

Module 8 |

Development Finance, Impact Investing & Ethical Finance

4 days | 5 ECTS Credits

China Global Philanthropy Institute

Prof. Wenhua Ma (CGPI & PKU) • **Prof. Ciguan Qiu** (CGPI & SAIF) • **Dr. Heather Grady** (CGPI & Rockefeller Foundation) • **Dr. Allan Chan** (Happiness Capital) • **Dr. Hanrong Tang** (Ehong Capital)



Module 9 |

Empirical Methods in Finance

4 days | 5 ECTS Credits

University of Geneva

Prof. Olivier Scaillet (UNIGE) • **Prof. Fabio Trojani** (UNIGE)

Module 10 |

Family Legacy Planning & Wealth Management

4 days | 5 ECTS Credits

China Global Philanthropy Institute

Prof. Joesph P. H. Fan (CUHK) • **Wenjun Qiao** (Zhonglun Law Firm) • **Peng Guo** (PWC) • **Dr. Heather Grady** (CGPI & Rockefeller Foundation) • **Yuedun Wang** (He Foundation) • **Yongsheng Lei** (CGPI & Infund) • **Yuanlong Li** (Wanxiang Trust)

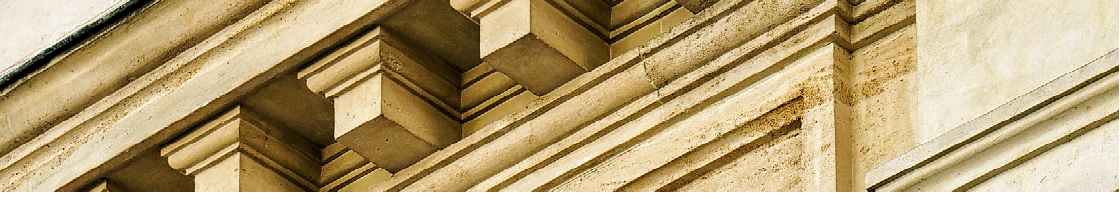
Modules 11-12 |

Research Proposal, Applied Dissertation & Defence

30 ECTS Credits

Workshop & Individual Work

The goal of the applied dissertation modules is to acquire evidence-based scientific research skills in the context of writing a professional doctoral thesis with academic integrity, focusing on some of the most innovative topics in Wealth Management and Sustainable Finance.



Assessment

The programme is part-time. Each module, as well as the professional doctoral thesis, are assessed. The doctorate thesis focuses on a professional topic chosen by the student. Active and regular participation is required in all parts of the programme.

Professional Doctoral Thesis

An applied professional doctoral thesis must be submitted within 12 months following the end of the teaching programme. Participants are required to write their thesis in English. Under certain circumstances, participants may submit their thesis translated into English by accredited translators.

Diploma Awarded

The Doctorate of Advanced Professional Studies in Applied Finance with Specialisation in Sustainable Assets and Wealth Management / *Doctorat professionnel de formation continue en finance appliquée avec spécialisation en actifs durables et gestion de patrimoine* is awarded by the Geneva Finance Research Institute of the University of Geneva. It corresponds to 80 ECTS credits. It is awarded to participants who meet the programme's assessment requirements and have fully paid their tuition fees.



Overview of the Professional Doctorate Degree at the University of Geneva

The Doctorate of Advanced Professional Studies in Applied Finance is the very first professional doctorate degree with a practical orientation to be delivered by a Swiss public university. From its onset in 2016, the ambitious programme of the University of Geneva was an immediate success, meeting the needs of the participants to full satisfaction.

The programme offers more than a general curriculum in Finance. By focusing on wealth management and sustainability, a leading activity of the financial industry, the professional doctorate offers a worldwide unique specialisation. Ideally positioned at the heart of Geneva, the leading financial centre in wealth management, the programme is supported by unrivalled expertise in the field, with cutting-edge teaching delivered by renowned professors and researchers, in close collaboration with local and international professionals.

Subject to an international quality audit, the programme has a proven track-record of success. Since its launch, the programme has enrolled more than 450 participants. As of this writing, about 80 students have successfully defended their applied research and obtained their professional doctorate degree. The results speak for themselves, as the high quality of the participants' applied research has been recognized by means of publication in journals and monographs of some of their work.

To reach this level, the programme has developed an innovative teaching platform that combines theoretical modelling with their direct application in concrete real-data problems at the international level. This performant tool fosters hands-on approach by allowing participants to create their own trading or portfolio strategies, replicate case studies in any market, and conduct instant empirical analysis using state-of-art methodologies for their own research.

Directed to enrich and enforce the knowledge and skills obtained in the classroom, the programme also offers a wide range of electives and extracurricular activities, during which the participants will gain insight into the latest trends and be inspired by the experiences shared by eminent scholars, experts, and peers. Bringing together the academic and the professional world, the programme and its surrounding activities thus provide networking and development opportunities to seize, while empowering participants to take greater mission-driven responsibilities in the shifting international landscape.

Practical Information

Admission Criteria

To be admitted to the programme, the students must comply with the following criteria:

- Hold at least a Master's degree from a university that is recognised by the University of Geneva;
- Have a minimum of 5 years of professional experience, or part-time equivalent, in banking, finance or in related industries;
- Be fluent in both English and Mandarin.

Deadline

30 April 2022

Further Information

Number of participants: 50-60 participants

Modality

Contact the Coordinator

Location

Geneva, Switzerland and Beijing/Shenzhen, China

Schedule

- The 10 modules take place from Thursday to Sunday
- 09:00-12:00 and 13:30-16:30

Contact

Marylaure Bloch
daps-finance@unige.ch
T.: +41 22 810 87 55

www.unige.ch/formcont/cours/daps-applied-finance





The Programme in Numbers

+470 Participants enrolled in the programme in the past 6 years

Characteristics

27% Women

73% Men

48 Years old on average

Educational Background

86% Master | EMBA | MBA holders

10% Ph. D. holders

Professional Background

75% Chairpersons | Presidents | Founders

10% CEOs | Directors

60% Controlling Stakeholders of Listed Companies

Sectors of Activity

45% Finance Industry

25% Manufacturing

15% Service

10% Real Estate

A Growing Alumni Community

+120 Graduates, with a professional thesis of publishable quality



Partnerships

China Global Philanthropy Institute (CGPI)

China Global Philanthropy Institute (CGPI) is a non-profit institute established in 2015 to provide executive education and postgraduate education in philanthropy and social entrepreneurship related disciplines. Founded by Ray Dalio, Bill Gates, Niu Gensheng, Ye Qingjun, and He Qiaonyu, the institute aims to advance social progress by nurturing global best practices in philanthropy, and supporting philanthropists, practitioners, and social entrepreneurs to achieve sustainable impact.

Its establishment is not only a pioneering work of global philanthropy, but also a model of international cooperation. CGPI brings together more than 100 renowned professors from top international universities, as well as domestic and foreign philanthropy practitioners, and it maintains close cooperative relationship with many non-governmental agencies. The Institute is strategically positioned as a platform that gathers global philanthropy leaders, and participates in discussions on global issues including sustainability, social impact investment, innovation in technology and philanthropy, and climate change.

<http://www.cgpi.org.cn/>

Geneva Institute for Wealth Management (GIWM)

The Geneva Institute for Wealth Management is a non-profit foundation created to promote international partnerships with the University of Geneva – in particular with its centre for research in Finance, the Geneva Finance Research Institute (GFRI) – in post-graduate education, executive education, research and knowledge transfer in wealth management and related fields. GIWM participates in the promotion and development of the Swiss financial centre as a hub for excellence in Wealth Management.

<https://giwm.ch/>



Testimonials

"Wealth management is one of the world's leading industries in Switzerland. It is a rare and precious opportunity to study at the University of Geneva and to be exposed to the world's top wealth management institutions. The programme far exceeded my expectations, with over 100% satisfaction. It never occurred to me that at the age of over forty I would go back to my passionate self, the young one eager to study and progress. This is a very valuable life experience, it's a forging process, and it increases self-discipline."

Ms. Jianyin Guo

"I thought the dissertation process was a highlight of the study programme. I learned a lot in the process of preparing for the paper. Professor Hoesli guided me step by step and helped me to take the paper to a level that I couldn't believe I could get to."

Mr. Ruibin Chen

"Through this study programme, I have further improved my future prospects in finance and other related activities. I will consider problems from a more comprehensive perspective and make more accurate decisions."

Mr. Guobin Wang

Partnerships



CHINA GLOBAL
PHILANTHROPY
INSTITUTE
深圳國際公益學院

**China Global Philanthropy Institute
(CGPI)**



**Geneva Institute for Wealth Management
(GIWM)**

Support



**Geneva Financial Center
(GFC)**