In collaboration with

VU Amsterdam

TIAS School for Business and Society

The RBA program is powered by

CFA Society VBA Netherlands

RBA Program

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Anne-Marie Munnik | CFA Society VBA Netherlands

Alfred Slager | TIAS School for Business and Society

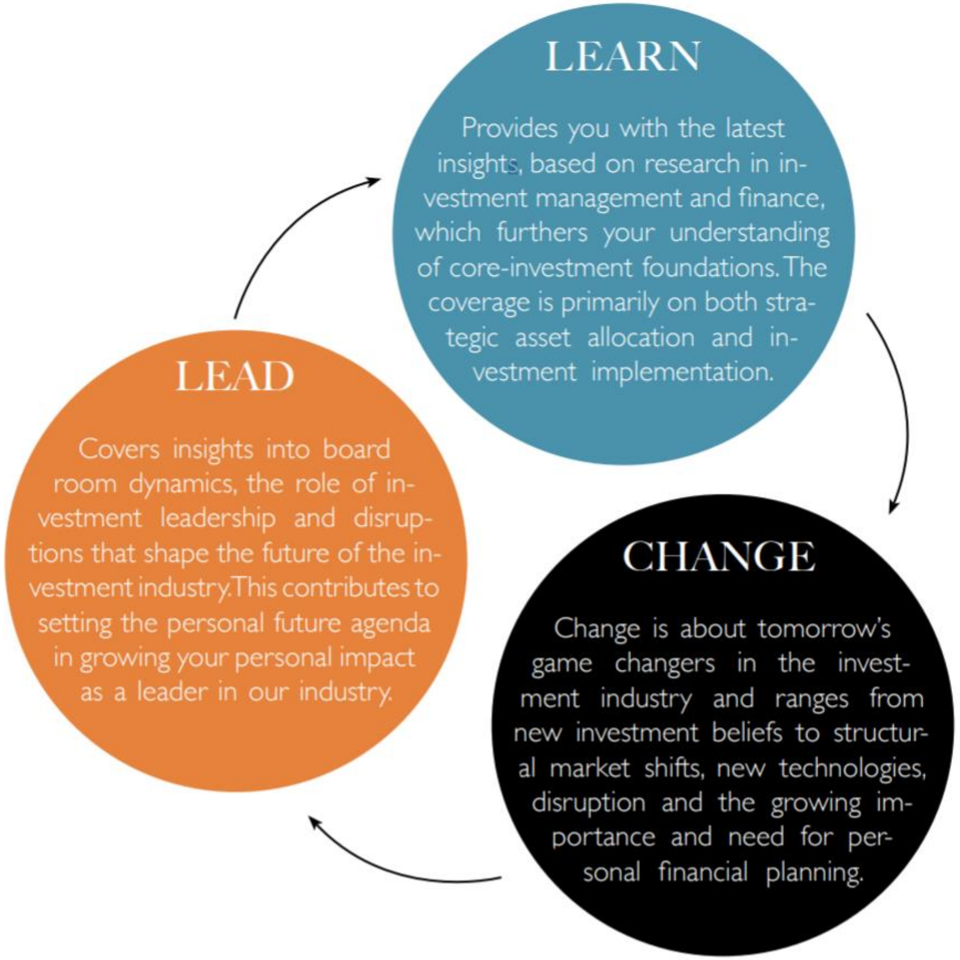
RBA Program

The RBA Program is a modular program, tailored to the experienced investment professional. The intensive world-class curriculum combines case studies, experiential projects and a variety of activities that make the RBA program a unique experience.

The program adapts to your needs. Interactive modules are combined in a 2.5-year track, where you can adjust the planning that fits best with your working schedule.

Our beliefs

The modules of the RBA program form a consistent portfolio and will boost personal development and professional growth. The RBA program constitutes different sets of modules around the pillars Learn, Change and Lead.



Design of the RBA program

The RBA program is designed as an integral, complementary program with modular certification. The RBA program consists of 12 modules. Completion of an individual module, after successfully passing the exam or rounding off the final assignment, qualifies for the relevant certificate.

Completion of all 12 modules qualifies for RBA designation. The RBA accreditation is reserved for CFA Society VBA Netherlands.

LEARN modules

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1. Understanding clients and behaviors
2. Regulatory dynamics and practical implications
3. Advanced asset allocation
4. Balance sheet management
5. The future of manager selection, monitoring and evaluation

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CHANGE modules

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6 Enhanced sustainable investment in practice

7 Impact and long-term investing

8 New investment technologies

9 Lifecycle investing and DC management

LEAD modules

10 Understanding boardroom dynamics and interaction

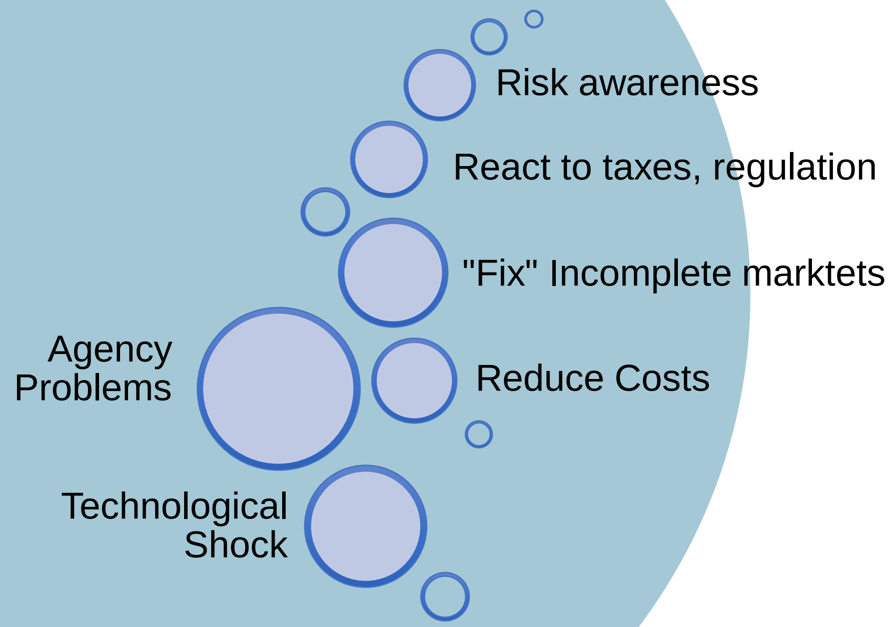
11 Investment innovation and change management

12 Growing your investment leadership

Module 8

New investment technologies

Why (1)



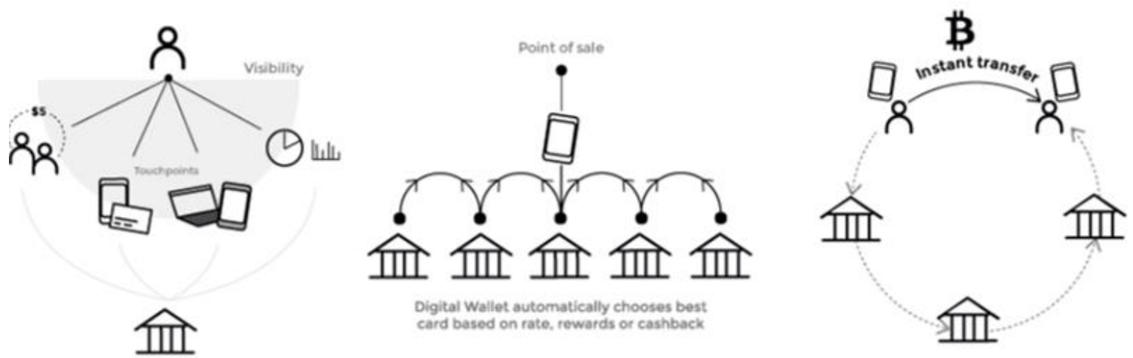


Exhibit 1: Overview of structural trends reshaping the Financial Services industry

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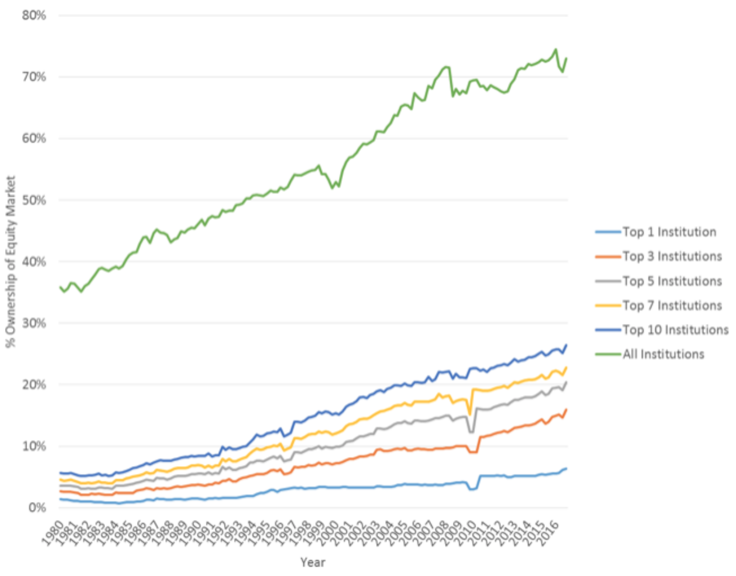
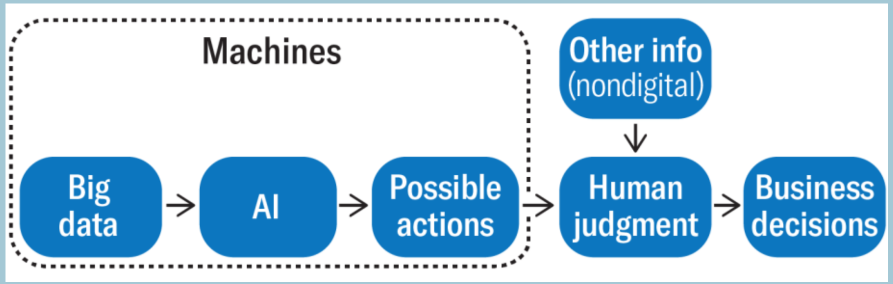
Why (2)

Changing Industry Structure



New forms of Decision Making



Learning goals

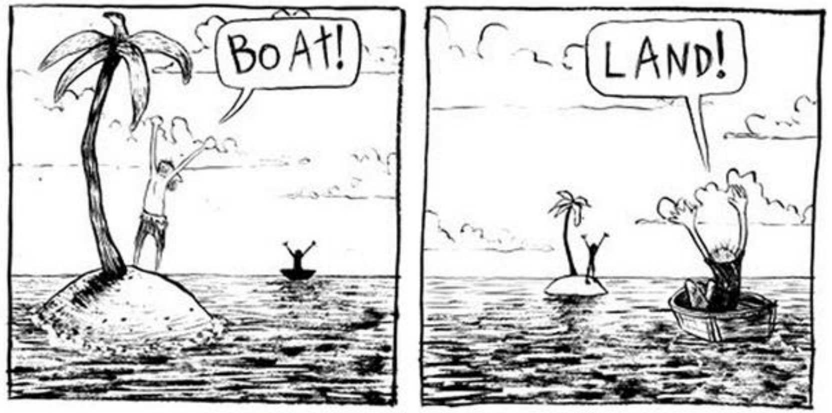
1. Develop an overview of the current technology market trends within investment management, and what can be learned from technology implementations in other industries.
2. Identify what choices an investment manager has to make to reach their business goals.
3. Examine AI and its relation to decision-making in investments, and how it drives significant growth for the global economy and provides value for society.
4. Identify new, emergent technologies such as blockchain and cryptocurrencies, how it changes processes, platforms, delivery.
5. Analyze the importance of incorporating automation and data analysis in the (real estate) investment process.

Exploratory approach

Working with case studies and experienced investors, we explore the technology transformation in the investment sector on different levels: industry, investment organization, decision making, own role.

Multi-faceted approach necessary: identify trends; explore opportunities / challenges.

Connecting literature / research tell us with technological changes in practice



Lecturers

ALEX BROUWER

Trends, IT Strategy, Implementation in Investment Management

- Partner KPMG Digital Advisory
- Previous Roles: Global Head ICT, IT Delivery Financial Institutions

MELINDA ROOK

Trends, IT Strategy, Implementation in Investment Management

- Senior Manager Asset Management KPMG Advisory
- Chair CFA Society VBA Netherlands
- Previous Roles: ICT Business Development Asset Management
- Guest Lecturer Nijenrode

EGBERT NIJMEIJER

Data Driven Approach to Real Estate

- Co-Head Real Assets at Kempen Capital Management
- Data-driven systematic investment approach with strong ESG focus
- Guest Lecturer Harvard Graduate School
- Previous Roles: development finance, portfolio manager

RANI PIPUTRI

AI and its relation to decision-making in investments,

- Head of Adaptive Investing at NN Investment Partners
- Lecturer UvA
- Previous Roles: principal equity strategies, portfolio manager, quantitative analist, consultant

JORIS CRAMWINCKEL

New, emergent technologies

- Head of Cloud Native Platform, Ortec Finance
- Applied Research to AI, Distributed Ledger Technology
- Previous Roles: Scenario Specialist, Business Analytics, Information Analyst

VbA academy

Module Set up

Online preparation to enhance discussions and learning in-class

Prep work

Kick-Off

Prep work

In Class

Assignment

Closing

Online Kick-Off and Prep Work

4 In-class sessions. Each session has preparatory work: online articles, smaller assignments to prepare cases in groups with other participants.

Hand In Assignment

Online Closing Session

4 ECTS, 112 hours in total,

Module Set-up

The module has an estimated study load of 112 hours (4.0 ECTS) in total (10 subsequent weeks of 10-12 hours).

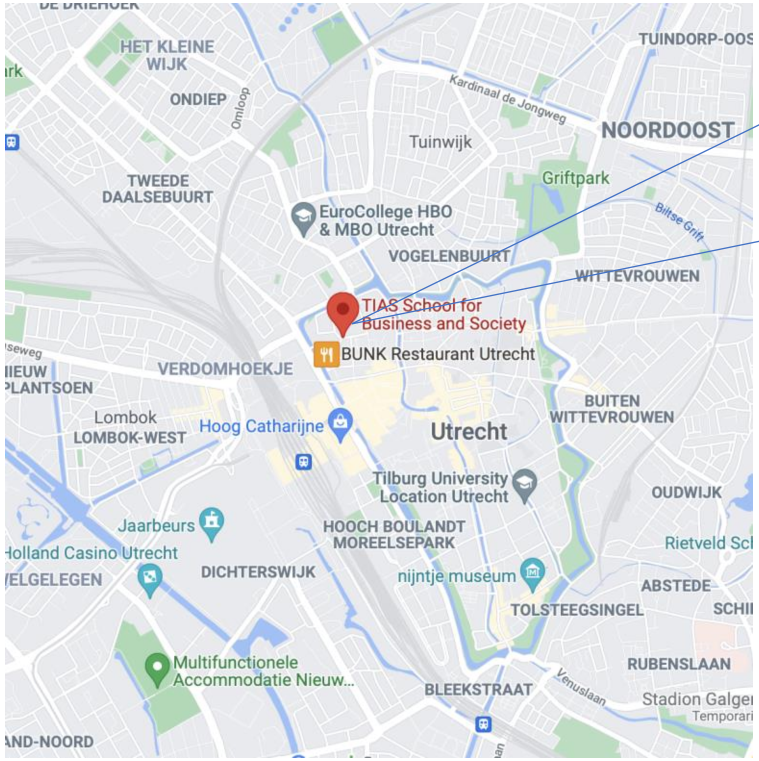
- Online session
  - Kick-Off, 1-hour, March 16 from 16:30 to 18:00
  - Closing session, 1 hour, to be planned
- 4 in-class lectures, in-class days at TIAS Utrecht from15:00 to 21:00
  - March 30 - April 13 - May 18 - June 1
- Study, preparatory work
  - pre-readings in preparation of in-class lectures
  - assignments in preparation of in-class lectures
  - working on the take-home assignment case
- Study, preparatory work
  - Topic from the lectures that affects your organisation, in small groups
  - Peer review, presentation and discussion

About TIAS

- Embedded in strong university
- Top 3 in Economics in Europe
- Top 3 in Business in Europe
- Excellent faculty
- Facilities: lecture theatre/ breakout rooms/ library access/ virtual class
- Network

Location TIAS

- In the centre of Utrecht
- 10-minute walk from Central Station
- Nearby parking garages



Practical information

RBA program

Designed for you?

The RBA program is developed for the investment professional who is motivated to learn and willing to invest in knowledge and skills that are required to change and lead the investment profession.

Ideally you are a mid to senior career professional. Typically, you work as an investment manager, portfolio manager, risk manager, investment administrator, investment advisor, fiduciary manager or client manager in a similar position. Participants could also work in a capacity of trustee, work for a regulatory authority or hold a supervisory position.

Study load & time allocation

Each module will require 10 weeks of 10 to 12 hours of study load including classes*. Class is scheduled once every two weeks in the late afternoon and evening.

This will vary according to your pre-education and work experience. You can sign up for each individual module when its suits you of enroll for the full program starting September 2022.

*) If the corona measures don’t allow in-class teaching, the entire or part of the program will be offered with live online classes.

Cost of module(s)

Full RBA Program (12 modules)	1.950 euro per module
1 module	2.295 euro
1 module for members*	2.050 euro
2 modules	2.195 euro per module
2 modules for members*	1.950 euro per module

*) Members of CFA Society VBA Netherlands

Registration & admission

When applying for one of the modules or the complete RBA program, a short motivation and resume are required.

Admission will be based upon your pre-education and the level of relevant work experience.

Interested or questions?

A fully detailed brochure is available for the program and per module. If you are interested or if you have any questions, please do not hestitate to contact CFA Society VBA Netherlands

Anne-Marie Munnik (Executive Director)

annemarie.munnik@cfavba.nl

About VBA Academy

The RBA program is part of the VBA Academy and is composed of different modules of executive nature.

The VBA Academy offers different modules and courses to the investment professional. Not only to keep their professional competence up-to-date, but also to help them grow in their careers to the next level of being a trusted partner with effective leadership and a good sense of integrity.

About CFA Society VBA Netherlands

The VBA Academy is powered by CFA Society VBA Netherlands, which is the association for investment professionals in the Netherlands.

It is our mission to contribute to the advancement and stability of the investment community by setting standards, raising ethics, improving competence and sharing knowledge.

All without a profit motive.