



THE IA

THEINSURANCEACADEMY

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**THE INSURANCE
ACADEMY GMBH**

Zentrum Staldenbach 6
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About THE IA

Navigating the intricate web of wealth protection demands more than isolated expertise – it requires a community of focused specialists. The Insurance Academy creates the space where Switzerland's insurance professionals connect, share insights, and elevate industry standards together.

Founded in November 2021 by Luca Bertacchi and leading Swiss banking experts, The Insurance Academy (The IA) addresses the critical need for specialized insurance knowledge development in the HNWI and Private Banking sectors.

We function as both a digital forum and in-person community, hosting sessions in the prestigious Fernfachhochschule Schweiz, FFHS Board Room in Zurich with hybrid accessibility. Like the ancient Akademeia of Athens, our exclusive community of more than 70 wealth management leaders collaboratively explores critical insurance topics.

The IA offers Switzerland's only specialist Life Insurance Certification through three progressive levels: Life Insurance Practitioner (LIP), Life Insurance Adviser (LIA), and Life Insurance Planner (LIPP). Each certification carries international recognition with digital credentials and enhanced professional visibility.

Our continuous digital platform extends conversations beyond sessions, creating an ongoing exchange for Switzerland's elite insurance professionals to share expertise and build meaningful relationships that advance both individual careers and industry standards.

**Insurance Excellence Through Practice,
Certified by Those Who Live It.**



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Our Pillars

1

THE IA SESSIONS

Our five annual 3-hour gatherings feature focused presentations from industry leaders (lawyers, fiscal experts, and wealth management professionals), followed by dynamic discussions that sharpen members' expertise on critical insurance topics.

Each session blends practical knowledge with networking opportunities at the prestigious FFHS Board Room (or via Microsoft Teams), complemented by welcome coffee and lunch to foster meaningful professional relationships.

2

THE IA CERTIFICATIONS

The Insurance Academy offers Switzerland's only specialist Life Insurance certification through three progressive levels: Practitioner, Adviser, and Planner. This structured pathway builds comprehensive expertise from technical foundations through practical application to strategic wealth integration, establishing a clear professional development framework for specialists in the high-net-worth advisory space. Our internationally recognized certifications provide digital credentials that significantly enhance professional visibility in the marketplace.

3

THE IA PLATFORM

The Insurance Academy's digital platform serves as a permanent forum where members extend conversations beyond structured sessions, deepening discussions and proposing new ideas. This interactive environment ensures continuous learning and collaboration among our professional community.

The platform also amplifies expertise through articles and news shared on our website and LinkedIn, connecting our expert community with the broader wealth management ecosystem interested in sophisticated insurance solutions.

The IA Life Insurance Certification Pathway

3. Life Insurance Planner

Mastery level

- Demonstrates comprehensive mastery of PPLI, ULI and wealth management integration
- Prerequisites: Adviser certification + 5 years industry experience
- Requires 20 credits with case study presentation and defense
- CHF 2,500 certification fee
- Benefits: Digital badge, mentor status, leadership in special working groups, featured as industry authority in wealth management publications with The Insurance Academy and our partners

2. Life Insurance Adviser

Advanced level

- Develops advanced understanding of PPLI and ULI strategies and applications
- Prerequisites: Practitioner certification + 2 years industry experience
- Requires 15 credits and a written case study
- CHF 2,000 certification fee
- Benefits: Digital badge, access to mentor matching program, technical support of the IA experts community for complex cases, contribution opportunities to IA publications

1. Life Insurance Practitioner

Foundation level

- Establishes foundational understanding of Private Portfolio Life Insurance (PPLI) and Universal Life Insurance (ULI) concepts and applications
- Requires 10 credits (earning 2.5 credits per assessment with grade pass)
- CHF 1,500 certification fee
- Benefits: Digital badge, official certificate, exclusive Q&A sessions with experts, access to member resource library, networking with certified professionals

The Insurance Academy Experience

The Learning Journey

- **Venue:** The prestigious Fernfachhochschule Schweiz (FFHS) Board Room in Zurich.
- **Hybrid learning accessible worldwide:** In-person sessions with exclusive networking lunches, and Live-streamed interactive online participation of 5-6 comprehensive sessions annually.
- **Premium materials:** delivered 7-10 days before THE IA sessions.
- **Multi-level assessment process:**
 - **Level 1 — Life Insurance Practitioner:** Foundational knowledge verification assessments after each session.
 - **Level 2 — Life Insurance Adviser:** Verification assessments plus written case analysis after completing all assessments.
 - **Level 3 — Life Insurance Planner:** Verification assessments plus oral presentation of client case study after completing all assessments.

Our Philosophy

“Insurance Excellence Through Practice: Certified by Those Who Live It.”

Study Curriculum Topics

The Insurance Academy **continuously adapts its curriculum to anticipate market evolution, regulatory shifts, and the sophisticated needs of global elite clients.** We deliver practical wisdom across wealth preservation vehicles (PPLI, Universal Life, Captive Insurance, and many more!).

- **Cross-Border Solutions:** Tailored Life Insurance approaches for global high-net-worth families.
- **Key Markets Expertise:** Israel, Latin America, Greece, Türkiye, Cyprus, Brazil, Mexico, UK, Germany, Austria, Switzerland, and Liechtenstein.
- **Regulatory Mastery:** EU IDD compliance frameworks, cross-border requirements, insurance distribution aspects, and post-reform adaptations.
- **Specialized Structures:** Universal Life optimization, captive insurance design, and Private Portfolio Life Insurance (PPLI).
- **Succession Planning:** Insurance solutions across different legal systems for multi-generational wealth.
- **Investment Excellence:** Optimizing insurance wrappers for sophisticated asset strategies, including alternative and private assets.
- **Digital Transformation:** Blockchain applications, cryptocurrency integration, and tech-enabled insurance platforms.

Our Best Team

The Insurance Academy is powered by a distinguished team of practitioners with extensive hands-on experience in sophisticated life insurance solutions for HNW and UHNW clients. Our leadership combines over three decades of expertise in private banking, wealth management, succession planning, and tax optimization strategies specifically tailored to complex wealth structures.



Luca Bertacchi

Founder and CEO

Luca Bertacchi, a respected figure in private wealth insurance, founded The Insurance Academy in 2021 after expanding a leading life insurance company across Europe. With over 25 years in private banking and wealth management, his expertise in insurance solutions for wealth preservation has made him a trusted advisor to major financial institutions. Through The IA, he now develops professionals who serve international private wealth clients.

Verónica Martínez

Partner

Verónica Martínez serves as strategic partner at The Insurance Academy, leading content and technology initiatives. With expertise in life insurance, private banking, and big tech, she develops practical educational programs for financial professionals. Her work bridges digital innovation with traditional wealth management, helping advisors better serve HNWI and UHNWI clients with contemporary preservation strategies.



THE IA Experts & Partners

+15 Leading Insurance Firms

+68 Life Insurance, Tax, and Wealth Management Experts

+130 Members from Elite Banks, External Asset Managers, Insurance Brokers and Family Offices

See you soon!



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