



AUTORITÉ
DES MARCHÉS FINANCIERS

Print from the website of the AMF

08 June 2020

Study of the rules implemented by banks for matching client profiles with products as part of an investment advisory service


This study looks at the processes implemented by banks to ensure that their investment advisory services are suited to their clients' profiles. The objective is to understand how institutions have implemented these rules and gauge the impact these rules have had on the range of financial investments offered to clients and the role played by advisors.

 Download content

Keywords

INVESTMENT ADVICE

ON THE SAME TOPIC

 Subscribe to our alerts and RSS feeds

ENFORCEMENT COMMITTEE
NEWS RELEASES

SANCTIONS & SETTLEMENTS

04 May 2022

The AMF Enforcement Committee fines a financial investment advisor and its manager for breaches of their professional obligations



AMF NEWS RELEASE

MARKETING

21 April 2022

The ACPR and AMF are urging professionals to improve their practices in online marketing of savings products and financial instruments

HOUSEHOLD SAVINGS
NEWSLETTER

MARKETING

06 April 2022

AMF Household Savings Observatory Newsletter - No. 48



Legal information:

Head of publications: The Executive Director of AMF Communication Directorate. Contact: Communication Directorate – Autorité des marchés financiers 17 place de la Bourse – 75082 Paris cedex 02