Cécile Liégeois
Clients & Markets Leader
+352 621 332 245
cecile.liegeois@pwc.lu

Isabelle Willequet
Advisory Senior Manager
+352 621 335 911
isabelle.willequet@pwc.lu

Etienne Hirsch
Head of PwC Academy
+352 49 48 48 6022
etienne.hirsch@pwc.lu

Denis Graas
Director, PwC Academy
+352 621 335 368
denis.graas@pwc.lu

MiFID II blended learning curriculum

Introduction

The CSSF circular 17/665 requires that professionals 'ensure and demonstrate to competent authorities that natural persons giving investment advice or providing information about financial instruments, investment services or ancillary services to clients on behalf of the professional possess the necessary knowledge and competence to fulfil their obligations.'

Mindful of the continuous flow of information and contradictory signals to which each and every one of us is exposed, PwC Academy has designed, in close collaboration with PwC's experts, an extensive blended learning curriculum to support the knowledge and competence criteria as set out by the regulator.

This training curriculum is designed to offer an effective, flexible and cost-efficient approach for professionals to build up and maintain their MiFID II knowledge and competence.

Your reasons why

- Keep internal skills and competencies up to date.
- Navigate the MiFID impacts.
- Gain deeper knowledge around MiFID requirements.
- Dive into the MiFID II frame-work, transaction reporting and governance.

Description

Our MiFID curriculum has been designed to assist asset managers, client advisors, front-office representatives and other professionals in scope of the CSSF circular 17/665 to strengthen their knowledge.

Having a clear view on what currently drives markets and what is expected to drive them tomorrow is critical to understand how these topics can be a catalyst for growth or a driver of efficiency for your organisation.

Objectives

By the end of this curriculum, participants will:

- familiarise themselves with MiFID II's purpose, main chapters, and compliance options;
- understand MiFID II's impacts on financial markets, including structures like OTFs, SIs, and dark pools;
- assess how MiFID II affects different business lines in financial institutions;
- recognise MiFID II's efforts to boost transparency in pre- and post-trade activities;
- highlight the importance of transaction reporting and governance within MiFID II;
- understand the risks associated with non-compliance in daily duties.

Made of complementary and modular building blocks, our curriculum will help you identify the best learning experience for you and your teams. They are proposed as comprehensive training programmes, but individual training modules can also be selected as standalone courses to meet specific needs. PwC Academy can help you create a customised pathway to align with your objectives.

Our modular training offering

		Modules	
MiFID II curriculum	Live learning	MiFID II: the essentials (2h)	MiFID II refresher (2h)
	Digital learning	MiFID II e-learning suite for Information Givers and Investment Advisors (61h to 68h)	MiFID II: refresher (e-learning) (2h) Coming soon!

Each of the live learning modules is the subject of dedicated training sessions.

Our trainers will also share with you best practices and tips.

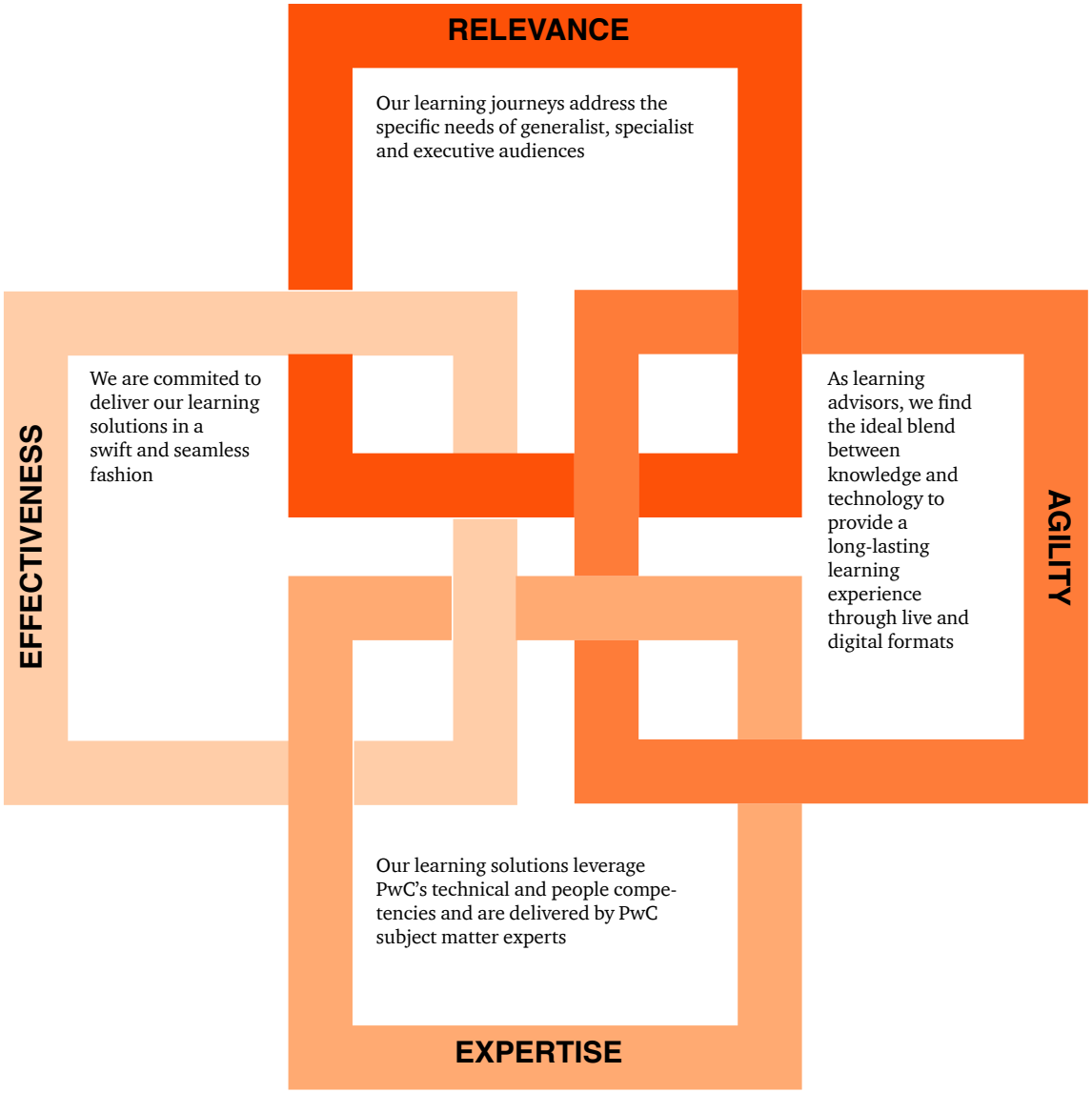
No pre-requisite for these courses.

Explore our MiFID II training modules

Tailored training programme

PwC Academy can also provide tailored solutions subject to the clearance of independence requirements.

Our value proposition



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