THE CFA PROGRAM

CFA Institute

Achieve the highest distinction in the investment management profession—the CFA® designation

The Chartered Financial Analyst (CFA®) Program helps you capitalize on your strengths, supercharging your education and work experience into a charter that will tell the world you have the skills necessary to compete and excel in today's complex and evolving investment industry. The CFA charter is the gold standard for the investment industry. Charterholders enjoy a mark of distinction throughout the world.

The CFA Program provides the strongest foundation in advanced investment, analysis, and real-world portfolio management skills for a career advantage that you will use at all stages of your career. This globally recognized, graduate-level credential is held by over 150,000 professionals across 163 countries.

Top Five Global Charterholder Roles

Job Titles

1) Portfolio Manager
2) Research Analyst
3) Chief Level Executive
4) Consultant
5) Risk Manager

Practice Types

1) Equities
2) Fixed Income
3) Private Equity
4) Derivatives
5) Real Estate

The Value of the Charter

- A powerful global network of top industry professionals
- A recognized commitment to ethics and professionalism
- Real-world skills for making complex investment decisions

> "You can hire people with an MBA, but you don't necessarily know that one MBA is the same as another MBA, whereas if you hire investment professionals with a CFA [designation], you absolutely have confidence at the level of qualification."
>
> **Jenny Johnson**
> Franklin Templeton COO/President

- Recognized and welcomed by markets and employers globally
- Fluency in both practical investment analysis and management skills
- Access to career advancing tools and education

HOW TO EARN THE CFA CHARTER

COMPLETE THREE LEVELS OF THE CFA PROGRAM EXAM

Focus areas vary by exam level, increasing in complexity and difficulty with a core of ethics and professional standards across all levels.

LEVEL I	LEVEL II	LEVEL III
(Offered every June and December)	*(Offered every June)*	*(Offered every June)*

KEY

Ethics and Professional Standards

Investment Tools
- Quantitative Methods
- Economics
- Financial Reporting and Analysis
- Corporate Finance

Asset Classes
- Equity Investments
- Fixed Income
- Derivatives
- Alternative Investments

Portfolio Management and Wealth Planning
- Portfolio Management
- Wealth Planning

Success Requires 4+
year commitment to complete the full program

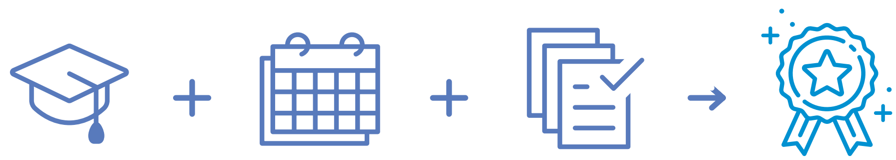
300+
hours of study per exam level

Comprehension
all exam questions are based on the CFA Program curriculum

Study Tools provided:

Ebook
2,700+ Practice Questions
Mock Exams
List of Approved Prep Providers

The Path to Becoming a Charterholder



Pass CFA Program Exams + **4 Years Qualified Work Experience** + **2–3 Letters of Reference** → **New Charterholder**

Next Steps

To enroll in the CFA Program and register for your first Level I exam, you must have an international travel passport and one of the following:

- **Undergraduate education:** A bachelor's (or equivalent) degree or be in the final year of your bachelor's degree program; or
- **Work experience:** Four years of professional work experience (does not have to be investment related); or
- A combination of **professional work experience** and **education** that **totals at least four years** (part-time positions do not qualify, and the four-year total must be accrued prior to enrollment).

For more information on the CFA Program visit www.cfainstitute.org/programs