

# CFA CHARTER

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 designation 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.

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 and respected credential is held by more than 190,000 professionals across 160 markets.



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, President and CEO**

## THE VALUE OF THE CHARTER

### POWERFUL GLOBAL NETWORK

of top industry professionals

### STRONG FOUNDATION AND COMMITMENT

to ethics and professionalism

**REAL-WORLD SKILLS** for making complex investment decisions

**RECOGNIZED AND WELCOMED** by markets and employers globally

**UNMATCHED EXPERTISE** in both practical investment analysis and management skills

**ACCESS** to career-advancing tools and education

## 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 Wealth and Private Markets
- 4) Derivatives
- 5) Real Estate

# HOW TO EARN THE CFA CHARTER

## THE PATH TO BECOMING A CHARTERHOLDER

- Pass Three Levels of the CFA Exam
- Submit Reference Letters
- Achieve Qualified Work Experience
- Apply for CFA Institute Charterholder Membership

## EXAM SUCCESS INCLUDES

### 300+ HOURS

On average, candidates spend over 300 hours of study per exam level.

### EXAM PREP

All exam questions are based on CFA Program curriculum.

### STUDY TOOLS

Online Learning Ecosystem, Practice Questions, Mock Exams, Candidate Discussion Board, Optional Practice Pack, CFA Institute Learning Mobile App, and Approved Prep Provider List.

### 4+ YEARS

On average, it takes over four years to complete the full program.

## ENROLLMENT REQUIREMENTS

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

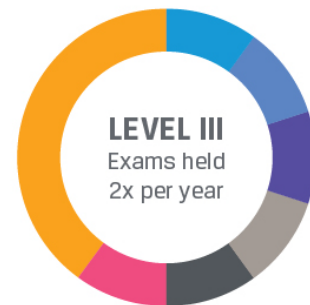
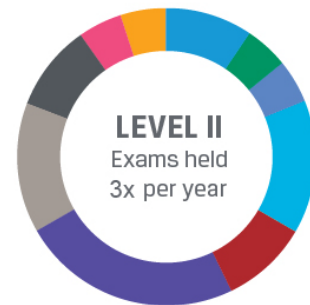
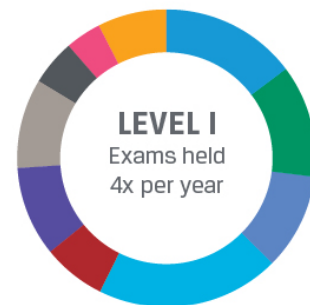
- **Bachelor's Degree** Complete a bachelor's program or equivalent program and received a university/college degree. If you're not sure if your program is comparable, ask your college or university.
- **Junior or Senior University Student** Be within 23 months from completing your undergraduate degree to begin your CFA Program journey.
- **Professional Work Experience** Have a combination of 4,000 hours of work experience and/or college/university education that was acquired over a minimum of three sequential years and achieved by the date of enrolling for the Level I exam. Dates of education and professional work experience cannot be overlapping.

## READY TO TAKE THE NEXT STEP?

Visit [www.cfainstitute.org/programs/cfa](http://www.cfainstitute.org/programs/cfa) for more detailed information.

## COMPLETE THREE LEVELS OF THE CFA EXAM

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



## CURRICULUM TOPICS

- ETHICS AND PROFESSIONAL STANDARDS
- QUANTITATIVE METHODS
- ECONOMICS
- FINANCIAL REPORTING AND ANALYSIS
- CORPORATE ISSUERS
- EQUITY INVESTMENTS
- FIXED INCOME
- DERIVATIVES
- ALTERNATIVE INVESTMENTS
- PORTFOLIO MANAGEMENT AND WEALTH PLANNING