

# 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 over 167,000 professionals across 165 countries.

*"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 CIO/President



## 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 Equity
- 4) Derivatives
- 5) Real Estate

# HOW TO EARN THE CFA CHARTER

## THE PATH TO BECOMING A CHARTERHOLDER

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

## EXAM SUCCESS INCLUDES

**300+** HOURS

On average, candidates spend 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, and Approved Prep Provider List.

**4+** YEARS

On average, it takes 4+ 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.
- ✓ **Final-Year Student**  
Be a final-year student of a bachelor's program or equivalent program on the date of enrolling for the Level I exam.
- ✓ **Professional Work Experience**  
Have a combination of four years (or 48 months) of full-time work experience and/or college/university education on 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 FINANCE
- EQUITY INVESTMENTS
- FIXED INCOME
- DERIVATIVES
- ALTERNATIVE INVESTMENTS
- PORTFOLIO MANAGEMENT AND WEALTH PLANNING