



WHAT IS THE CFA PROGRAM AND CFA CHARTER?

CFA PROGRAM

THE CHARTERED FINANCIAL ANALYST (CFA®) Program is designed to equip candidates with the knowledge and skills necessary to compete and excel in today's complex and evolving investment industry.

It is a self-study, three-level exam that tests the fundamentals of investment tools, company valuation, portfolio management, and wealth planning. Whether an individual is an aspiring or practicing investment professional, the CFA Program offers a way to move forward and achieve professional goals.

The curriculum is developed by CFA Institute, one of the world's leading associations of investment professionals. By enlisting the investment industry's brightest minds to continually improve the CFA Program, CFA Institute ensures that the curriculum is always relevant and provides real-world skills in investment analysis.

CFA CHARTER

The CFA charter is a designation awarded by CFA Institute to those who have completed the CFA Program and achieved CFA Institute regular membership. As the highest distinction in the investment industry, the CFA charter is the gold standard. It is globally recognized and held by over 188,000 professionals worldwide in 164 markets. CFA charterholders are qualified to work in senior management positions across the investment industry.

Learn more about the CFA charter [here](https://www.cfainstitute.org/programs/cfa/charter): <https://www.cfainstitute.org/programs/cfa/charter>

Earning the CFA Charter

To earn the CFA charter, an individual must:

- ✓ Pass the three levels of the CFA exam (Level I, Level II and Level III)
- ✓ Become a CFA Institute regular member by:
 - ◆ Attaining qualified work experience
 - ◆ Submitting an application which includes
 - Documenting qualifying work experience
 - Submitting references
 - ◆ Applying for society membership
 - ◆ Joining CFA Institute as a regular member upon receiving acceptance

HOW THE CFA CHARTER HELPS TO ADVANCE CAREERS

The recognition that comes with earning a CFA charter benefits charterholders throughout their careers.

Widely considered the apex for professional development in the investment industry, the CFA designation is valued by employers for roles and functions in every sector of global finance, including portfolio management, analysis, private wealth, and consulting. Distinguished by their commitment to set a higher standard of excellence, charterholders are sought after as investment industry professionals. With over 200,000 CFA Institute regular members around the globe, CFA charterholders have an instant network of like-minded professionals that can help support them in their careers.

Key Benefits

Expansive Knowledge, Skills, and Commitment to Ethics

The CFA charter provides the strongest foundation in advanced investment analysis and real-world portfolio management skills for a career advantage that can be used at all stages of an individual's career. It prepares an individual to enter today's market and signifies a strong foundation and commitment to ethics and professionalism.

Relevance in a Variety of Career Paths

CFA charterholders occupy a range of investment decision-making roles including buy-side, sell-side, corporate and advisory positions. Many CFA charterholders are portfolio managers (including hedge fund managers), private wealth managers, equity research analysts, manager-of-managers, and brokers.

Value in an Evolving Industry

As a globally recognized credential in the investment industry, earning the CFA charter demonstrates to employers that an individual has the knowledge and commitment to thrive in today's complex and evolving investment industry. The CFA® designation is a mark of distinction, and investment firms know it represents a higher standard.

WHO SHOULD CONSIDER THE CFA PROGRAM?

The knowledge and skills gained from the CFA Program will help aspiring or practicing investment professionals to thrive in a highly competitive industry.

The CFA Program offers practicing investment professionals, university students, or those switching careers with a way to enhance their career and achieve their professional goals. As a generalist program, it covers a breadth of transferrable skills preparing individuals for many different job roles. Individuals that take the CFA Program early in their career can broaden their options.

Benefits for Students

Suits Any Schedule: Students can advance through the program by setting their own schedule for study and sitting the exam. It is possible to get started while in school – enrolling and taking the Level I CFA exam with only two years remaining in their undergraduate studies.

Powerful ROI: The CFA Program is a good return on investment. Earning the CFA charter gives individuals the distinction of joining a prestigious group of elite investment professionals – an achievement that can open doors for career growth. With an investment of USD 1,250, individuals can register for the Level I CFA exam and begin to reap the benefits of the CFA Program journey in the job market.

Students Have a Head Start: Students are already used to studying and are well prepared to tackle the deep, higher education curriculum of the CFA Program (particularly if they are in a finance-related major).

Stand Out with a Digital Badge: CFA Institute distributes digital badges to candidates that have successfully passed Level I or Level II of the CFA Program. Digital badges offer a way for candidates to showcase their achievement in an online, verifiable format. CFA Institute also distributes digital badges once an individual earns the CFA charter and for professional learning milestones.

Competitive Advantage: With the CFA charter, individuals will gain a competitive advantage among employers by possessing a globally recognized credential. Combined with the career support resources that are available as a candidate and member, students can be well prepared for a wide variety of careers.

Global Recognition: The CFA charter is globally recognized as the gold standard in the investment industry, giving CFA charterholders a passport to work in any financial market they choose.

CFA Program Scholarships

Scholarships, or discounts on the price of the CFA Program, help make the CFA charter more attainable and give more people an opportunity to advance their career.

Scholarships are available to full-time students attending a school in the CFA Institute University Affiliation Program; full-time college/university professors; and /or administrators/department heads who teach a minimum number of credit hours at qualified institutions.

Additional types of scholarships are available, all of which waive the program enrollment fee and reduce the exam registration fee.

Learn more [here: www.cfainstitute.org/programs/cfa/scholarships](http://www.cfainstitute.org/programs/cfa/scholarships)

CFA Program Costs

One-time enrolment fee

USD 350

+

Early registration

USD 900

OR

Standard registration

USD 1,200