CHARTERED FINANCIAL ANALYST®
The Gold Standard for Investment Professionals
Chartered Financial Analyst® (CFA®)

The CFA® program, a graduate-level program of the CFA Institute in USA, is designed to develop competencies and professionalism required in investment management and advisory services. The CFA Charter is widely recognized by investors, investment practitioners, employers, regulators and the media across the globe as the highest ethical, education and professional standard in an investment community. Thus, CFA charterholders are highly sought after in the marketplace.

Benefits of the CFA Charter

Global Recognition

The CFA Program is the most widely recognized and respected qualification in investment across the globe. When you earn the CFA charter, clients and colleagues will respect you for the expertise and professional standing.

Career Advantage

In the face of globalization and internationalization, employers and clients require professionals who demonstrate competencies in the implementation of global investment strategies. The first line of professionals sought are CFA charterholders. With a CFA qualification, it helps you to boost career prospects.

Practical Skills

The CFA Program curriculum focuses on the practical knowledge and current skills required in investment management, together with professional codes of conduct. The Program is designed to prepare you for a wide range of investment specialties that are applicable in many parts of the world. More importantly, this knowledge and skill can be applied immediately to your job.

Community

Earning a CFA qualification will place you as part of an elite global community of nearly 100,000 investment professionals. You will be associated with the other charterholders around the world who share the strong commitment to the highest standards of investment education, ethics, and professional excellence.

Steps Leading to the Acquisition of a CFA Charter

To be a CFA charterholder, one must fulfill both the education and work experience requirements.

Acquire a CFA Charter

- 4 years of relevant work experience (before, during, or after examinations)
- Professional conduct statement
- Member dues
- CFA institute member in good standing

Registration with cfa institute.org

Bachelor’s degree or other entry requirements

Level I Exam (June or December)

Level II Exam (June)

Level III Exam (June)

By Job Occupations

- Portfolio Manager
- Research Analyst
- Chief Executive
- Consultant
- Relationship Manager
- Risk Manager
- Financial Advisor
- Corporate Finance Analyst
- Investment Banking Analyst
- Trader
- Accountant
- Auditor
- Strategist
- Broker
- Private Banker
- Performance Measurement Specialist

By Sectors of Employment

- Equities
- Fixed Income
- Private Equity
- Derivatives
- Hedge Funds
- Real Estate
- Structured Products
- Commodities
- Foreign Currency
- Indexed
- Venture Capital
CFA Program Curriculum

The CFA Program is drawn from a broad Candidate Body of Knowledge (CBOK) from CFA Institute that provides the knowledge, skills, and abilities you will need to succeed in the workplace. The Program is organized into 4 functional areas, with 10 general topics, as indicated below.

Ethical and Professional Standards
- Ethical and Professional Standards

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

Asset Valuation
- Equity Investments
- Fixed Income Investments
- Derivatives
- Alternative Investment

Portfolio Management and Wealth Planning
- Portfolio Management and Wealth Planning

CFA Program Levels

The Program is divided into three integrated levels of study, namely, Levels I, II and III. There is one examination in each level, and candidates are given 6 hours to complete each written examination. Candidates must pass the examination before progressing to the next level.

Level I

This level tests candidates on knowledge and its comprehension, with emphasis on tools and inputs relating to investment valuation. The CFA Institute Code of Ethics and Standards of Professional Conduct is a focal point at Level I. The examination has 240 multiple-choice questions.

Level II

Analysis and application are emphasized, with a focus on asset valuation. The examination consists of 20 item sets, 10 in the morning session of the examination and 10 in the afternoon session. Item sets are sometimes called “mini-cases”. Each item set on the CFA examination consists of a vignette (or case statement) and six multiple-choice questions.

Level III

Core study areas of Level III involve the synthesis of information from Levels I and II. This final examination includes 12-15 essay questions and item-set questions.

Workshop Structure

Our Financial Analyst Workshop is a structured study-program designed jointly by Sunway TES and AB Maximus to prepare investment professionals and graduates for a career in investment and finance. In particular, it assists participants to prepare for the CFA examinations.

As a workshop participant, you will undergo a series of guided-learning processes shown below.

Module 1  Ethics/Quantitative Methods/Economics
Module 2  Financial Reporting and Analysis
Module 3  Asset Valuation/Portfolio Management and Wealth Planning

Internal Assessments and Review Sessions

There are internal assessments which are set to the closest examination environment possible so that you can be fully prepared for their CFA examinations. All assessments will be discussed in the review sessions.

All modules, assessments and review sessions are conducted at Sunway College, Bandar Sunway, Petaling Jaya, usually on Saturdays and Sundays.

A total of up to 88 hours is dedicated to face-to-face teaching and learning, and you are highly recommended to spend an additional 12 hours per week on personal revision and practice questions. In general, CFA Institute recommends a CFA Program candidate to devote at least 250 hours to prepare for each level of the CFA examinations.

There are also Live Revision Classes available for Level I and II.

Qualified and Experienced Trainers

A team of qualified and experienced trainers will facilitate the workshops. These trainers have a postgraduate qualification such as CFA, CPA, Chartered Accountancy, MBA or PhD and a wealth of industry experiences. You will get first-hand knowledge on how investment concepts and principles are applied in the real financial world.

Learning Materials

Schwester Notes, Practice Exams and other CFA study materials are included in the programme.
Workshop Registration

Entry Requirement

To become a CFA Program candidate, you must fulfill one of the following entry requirements:

- Hold a Bachelor’s degree or its equivalent, or
- Be in the final year of your Bachelor’s degree at time of registration, or
- Have four years of qualified, professional work experience, or
- Have a combination of work and college experience of at least four years. (Note: Summer, part-time, and internship positions are not applicable)

Other requirements of the CFA Institute include:

- Meet the professional conduct admission criteria (During the application process, you will be asked to sign Statements of Professional Conduct and Candidate Responsibility), and
- Be prepared to take the examinations in English

Upon fulfilling all of the above requirements, you may enroll yourself as a CFA Program candidate online at cfinstitute.org.

Intakes

Level I : January, July
Levels II, III : January
A minimum of 2 ½ years to complete all levels

Examination Months

Level I : June, December
Level II, III : June

About A.B Maximus & Co.

A.B. Maximus & Co is a leading provider of professional training and continuing education programs for capital markets professionals. It was founded in 1996 as a training consultancy specializing in Chartered Financial Analyst (CFA) preparatory classes. It was the pioneer in CFA review programme in Singapore and most of our instructors are with us since the beginning. Besides training, the company provides association management / secretariat services to industry organizations and selected nonprofit societies including CFA Malaysia, CFA Singapore and CFA Indonesia.

Sunway TES Advantages

☑ Partners with AB Maximus, a leading course provider for capital markets’ training in Singapore and the CFA course in Southeast Asia, in offering structured classes to prepare CFA candidates in Malaysia for their examinations.

☑ All workshop sessions are fully conducted over the weekends in a university-campus environment.

☑ Has strong academic support from an international and local team of trainers in the CFA studies.

Contact Details

For enquiries or registration, contact:

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