

Investing in Your Future

Moderator:

James Lewis, CFA, CIPM

Speakers:

Deanna Adams, CFA

Manish Ghayalod, CFA

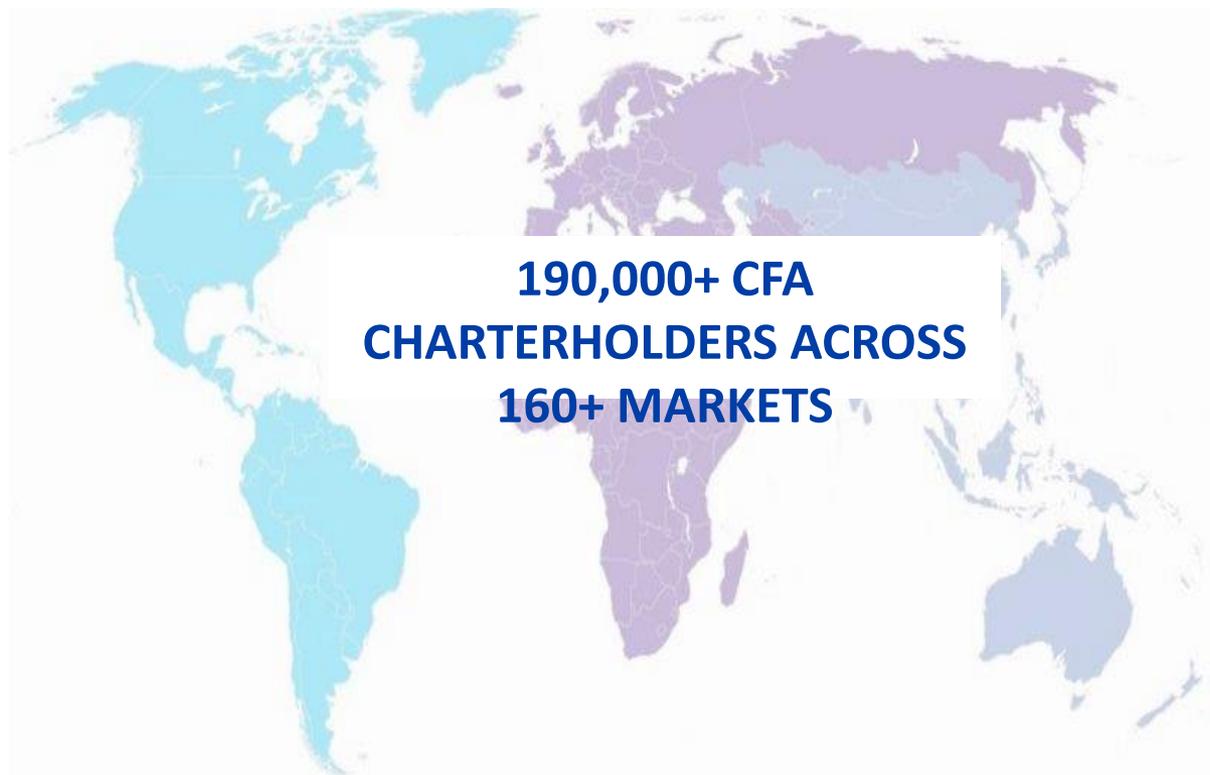
Sidi Zhao, CFA



**CFA Society
Los Angeles**

SCOPE OF THE CFA[®] CHARTER

THE CFA[®] CHARTER IS A GLOBALLY RECOGNIZED CREDENTIAL



**160+ CFA
SOCIETIES**

**750+ AFFILIATED
UNIVERSITIES**

**PROGRAM
RECOGNIZED BY
60+ REGULATORS
IN MORE THAN 40
MARKETS**

A portrait of David Allen, CFA, a middle-aged man with short, light brown hair, wearing a dark grey suit jacket, a white dress shirt, and a blue patterned tie. He is looking slightly to the left of the camera with a neutral expression. The background is a solid blue color.

DAVID

ALLEN, CFA

*INSTITUTIONAL DIRECTOR,
SCHRODERS*

“When there is a candidate who has CFA® charterholder on their resume, it’s a big differentiator, it’s an absolute commitment to the profession.”

**David Allen, CFA,
Institutional Director,
Schroders**

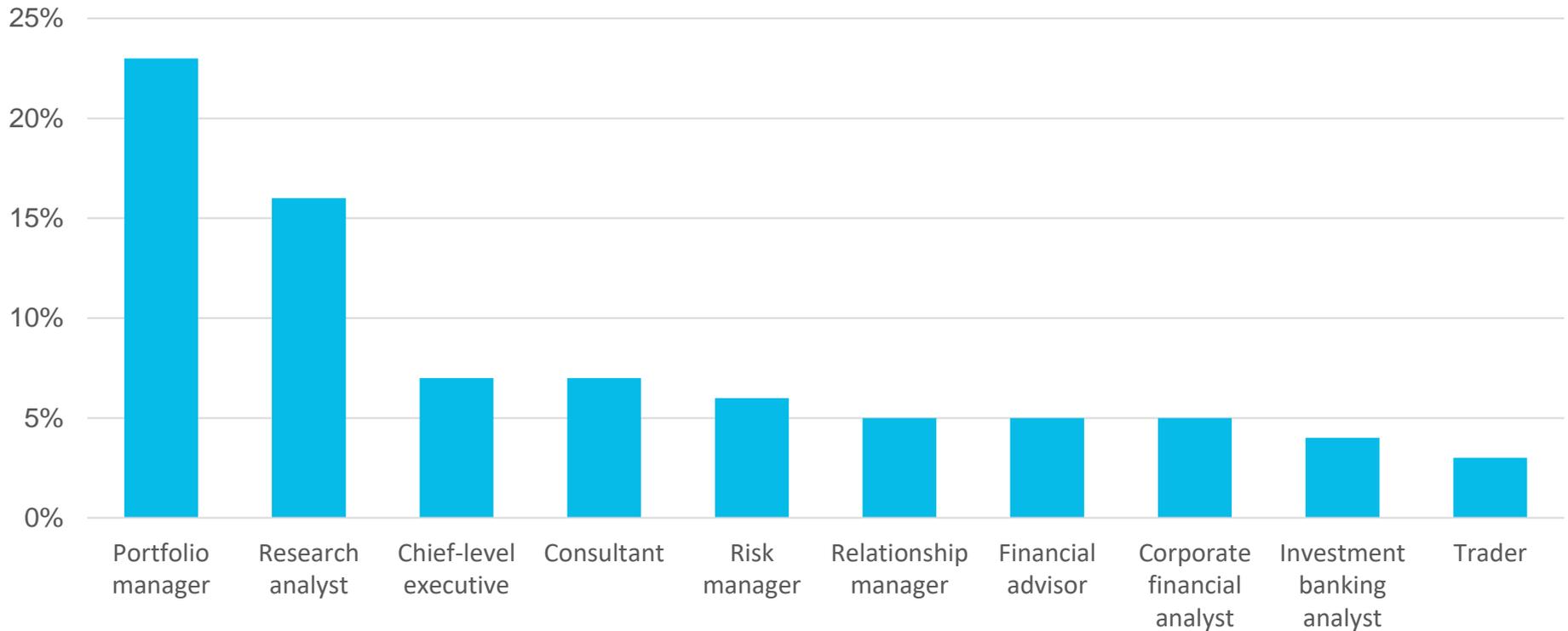
“Those three letters give you an edge over other graduates on the job market.”

Financial Times, 2020

BENEFITS OF THE CFA CHARTER

CFA PROGRAM[®] OPENS DOORS TO MANY ROLES

TOP ROLES FOR CFA CHARTERHOLDERS



THE TOP GLOBAL EMPLOYERS OF CFA[®] CHARTERHOLDERS

Allianz

Scotiabank

Morgan Stanley

Citi

BlackRock

UBS

Goldman Sachs

Deutsche Bank

CIBC

RBC

JP Morgan Chase & Co.

Fidelity Investments

B of A Securities

TD Ameritrade

PWC

Credit Suisse

Bank of Montreal

Wells Fargo

HSBC

Ernst & Young

BENEFITS OF THE CFA CHARTER

IT MAKES YOU MARKETABLE

BUT DON'T JUST TAKE IT FROM US.

NEARLY

90%

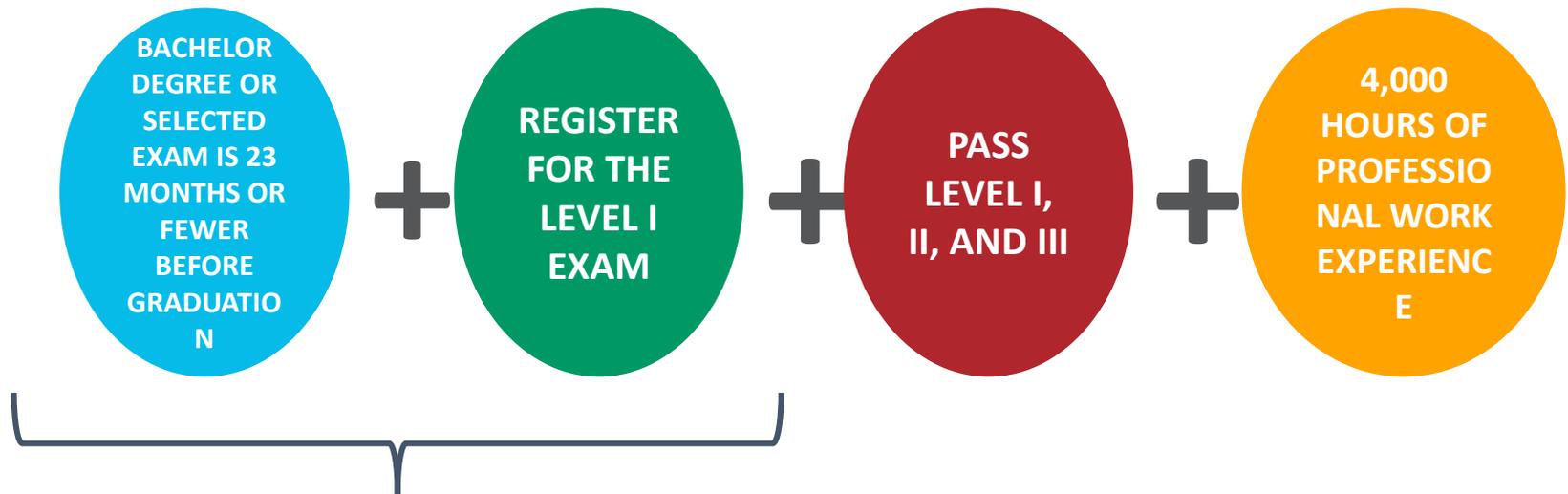
of investment firms prefer
CFA[®] charterholders¹

OVER

80%

of CFA charterholders say
the CFA charter boosted
their career²

THE CFA[®] PROGRAM EQUATION: Path to Gaining the Charter



GET STARTED HERE TODAY.

You may have already learned level I materials through your studies – which means you have a foot in the door.

WHAT YOU'LL LEARN

ACCORDING TO CFA[®] PROGRAM CANDIDATES:

Comprehensive Knowledge

97%

OF CANDIDATES agree that the curriculum Improved their understanding of Important topics.

Current Practices

95%

OF CANDIDATES report that the curriculum accurately reflects current Industry practices.

Real-World Application

95%

OF CANDIDATES say the curriculum focuses on concepts Important to their profession.

Relevant Exam

84%

OF CANDIDATES feel the exam questions covered subject matter of Importance to Investment professionals.

CURRICULUM TOPICS

ETHICAL AND
PROFESSIONAL
STANDARDS

QUANTITATIVE
METHODS

ECONOMICS

FINANCIAL
STATEMENT
ANALYSIS

CORPORATE
ISSUERS

EQUITY
INVESTMENTS

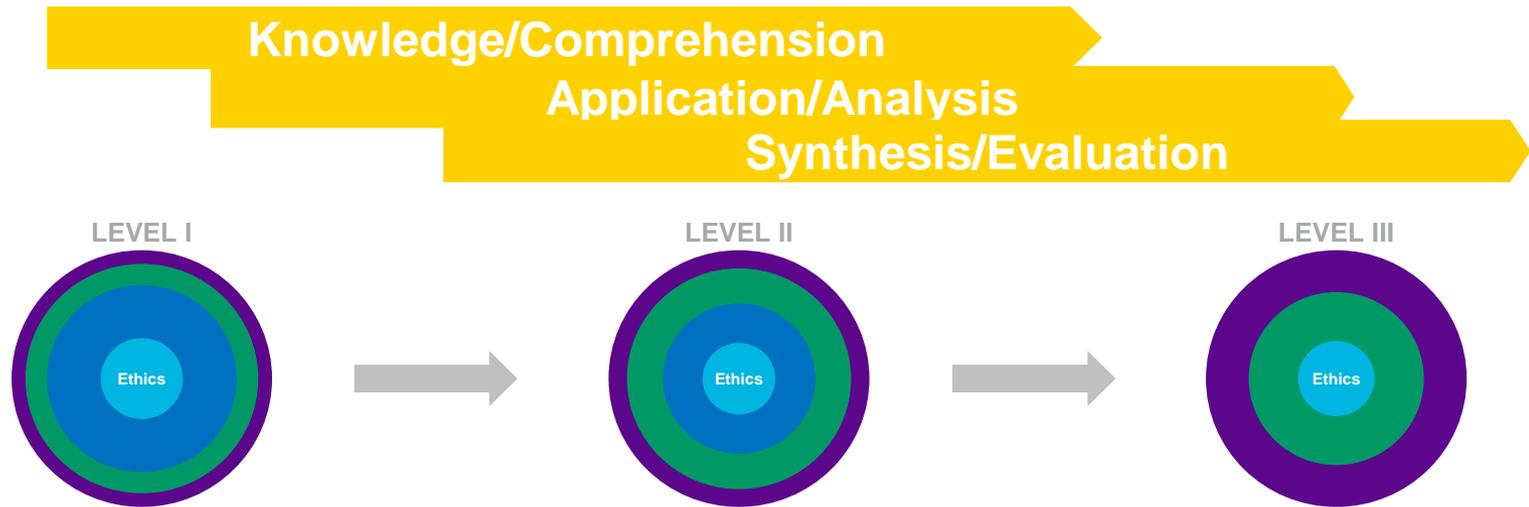
FIXED
INCOME

DERIVATIVES

ALTERNATIVE
INVESTMENTS

PORTFOLIO
MANAGEMENT
AND WEALTH
PLANNING

THE THREE LEVELS OF THE CFA EXAM



Ethics & Professional Standards		
Investment Tools	Asset Classes	Portfolio Management & Wealth Planning
<ul style="list-style-type: none"> Quantitative Methods Economics Financial Reporting & Analysis Corporate Finance 	<ul style="list-style-type: none"> Equity Investments Fixed Income Derivatives Alternative Investments 	<ul style="list-style-type: none"> Institutional Private Wealth Portfolio Evaluation Risk Management

QUESTION TYPES

Level	Format	Typical Number of Questions*
I	<p>Multiple Choice Stand-alone multiple-choice questions</p>	<p>180 Questions Average question = 1½ minutes Total Exam Time = 4.5 Hours</p>
II	<p>Item Sets 1-2 page cases (vignettes) with related multiple-choice questions (item sets)</p>	<p><i>22 Item Sets (10 each in AM and PM); 88 accompanying multiple-choice questions</i></p>
III	<p>Constructed Response Discussion-type (essay) and problem solving questions</p> <p>Item Sets</p>	<p><i>First session: vignette-supported essay sets with variable response methods (essay, numerical entry, multiple choice)</i></p> <p><i>Second session: 44 multiple choice items sets followed by 4 multiple-choice questions.</i></p>

THE LEVEL I EXAM

HERE'S ALL YOU NEED TO KNOW ABOUT ABOUT TAKING THE LEVEL I EXAM

LEVEL I EXAM DATES
February, May,
August, November

	February 2024	May 2024	August 2024	November 2024
Registration Closes*	8 Nov 2023	31 January 2024	9 May 2024	8 August 2024
Exam Window	19-25 February 2023	15-21 May 2023	20-26 August 2023	13-19 November 2023

LOCATIONS

Exams proctored in **400+ locations globally**

DURATION

Two 2.25-hour sessions for Level I

COST

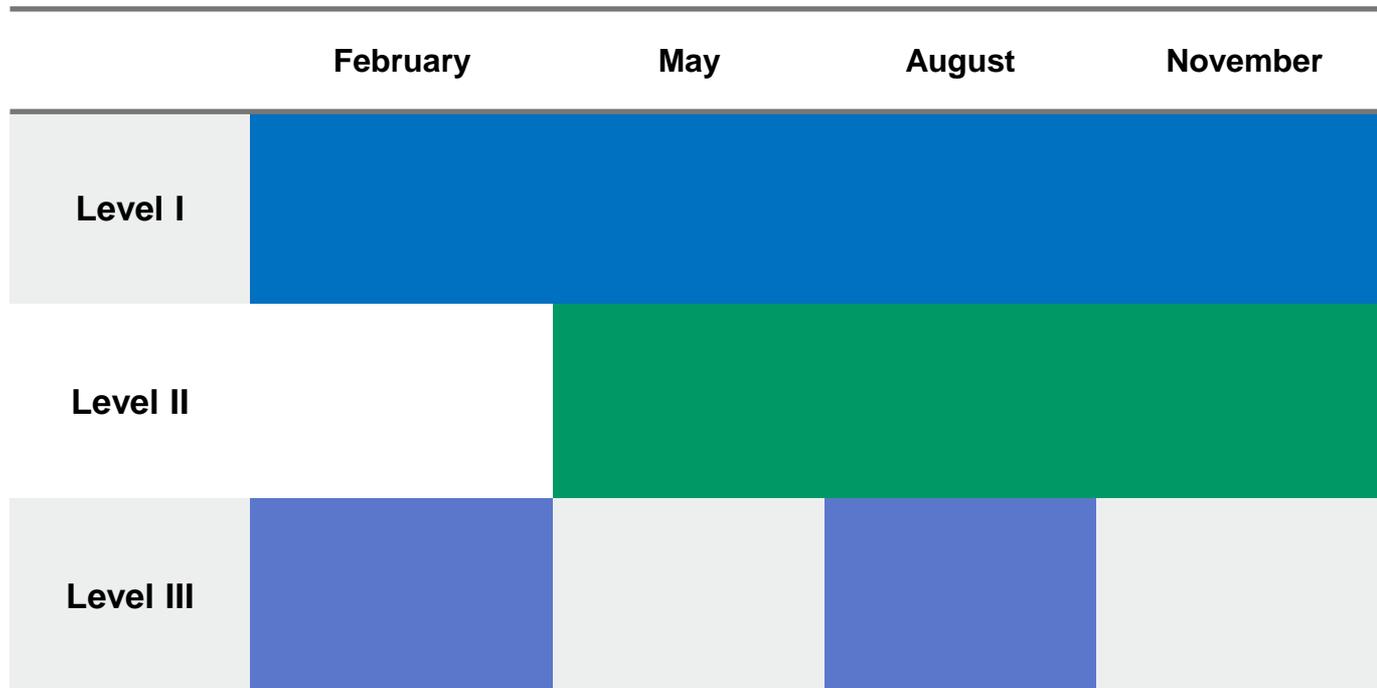
- **One-Time Enrollment Fee:** USD 350
- **Early Registration Fee:** USD 940
- **Standard Registration Fee:** USD 1,250

*Registration deadlines subject to change



EXAM SCHEDULE

2024



Scan me





COMPUTER-BASED TESTING (CBT)

- All levels of the CFA Program transitioned to CBT in 2021
- 4 testing windows (up to 7 days each) annually: February, May, August, November
- Self-schedule in exam window
- 400+ testing locations globally in highly secure computer testing centers
- Total testing time is 4.5 hours

= a more flexible and convenient examination experience!

THE KEYS TO CFA PROGRAM SUCCESS



Average completion time is four years, with most candidates taking between two and five years



Successful candidates report dedicating more than 300 hours of study per level

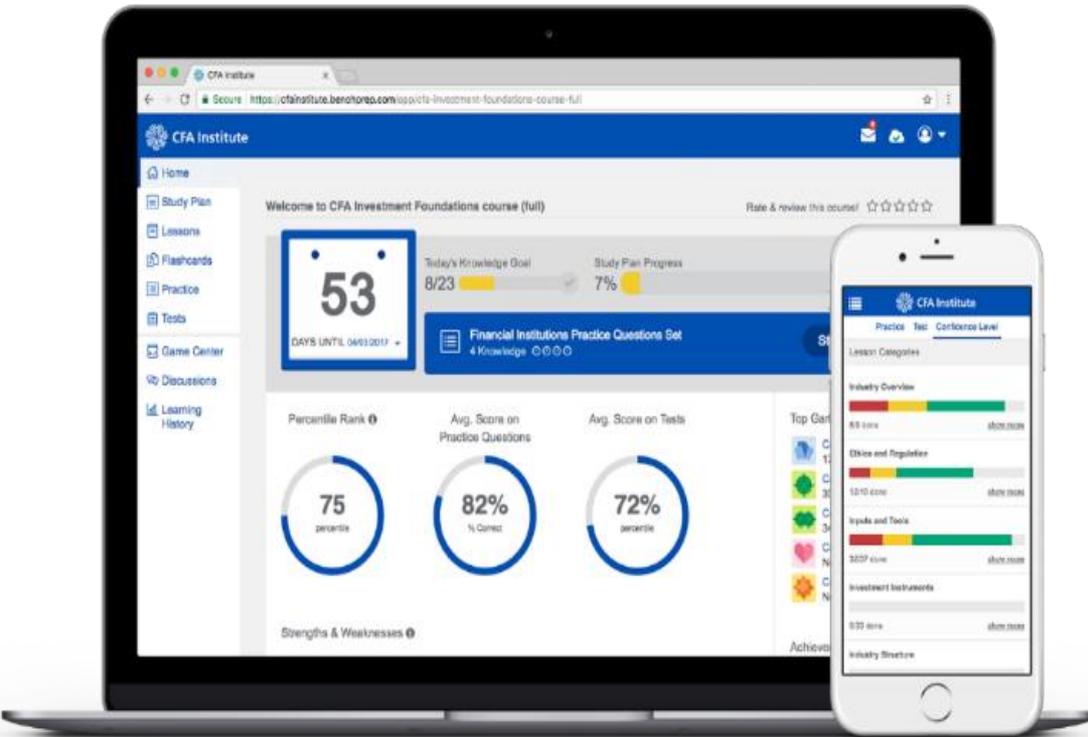


The CFA Program curriculum is the only source material for exam writers

AVAILABLE STUDY TOOLS

- Learning Eco-System
- Tests and practice exercises

IMPROVED CANDIDATE LEARNING EXPERIENCE



Dashboard
that indicates
progress and
performance

Consolidates
curriculum and
study tools into an
integrated
platform

Web-based
for any mobile
device

Device syncing
to all your devices

**Instructional
delivery**
best practice (e.g.,
spaced repetition,
gamification)

**Personalized
learning
experience**
based on behavior
and preferences

SCHOLARSHIPS

- Access: For individuals who may not be able to afford the program fees and have not yet registered for their next exam. → Reduced to \$300
 - **Application Window: OPEN**
- Student: For students currently attending an affiliated university and have not yet registered for their next exam. → Reduce to \$400
 - **Application Window: OPEN**
- Women's: For women who are interested in earning the CFA charter, do not qualify for other CFA Institute scholarships, and have not yet registered for their next exam. → Reduced to \$400
 - **Application Window: Opens October 8th, 2023**



More information on our website;
<https://www.cfainstitute.org/en/programs/cfa/scholarships>



CFA Society Los Angeles

Mission Statement

CFA Society Los Angeles promotes integrity, professional excellence and engagement among its members and within the community.

About CFA Society Los Angeles

CFA Society Los Angeles is an association of local investment professionals, consisting of portfolio managers, security analysts, investment advisors and other financial practitioners, that has served CFA charterholders and CFA Program candidates locally since 1931.

What are the benefits of joining CFALA?

CFALA Signature Events

- CFA Society Los Angeles' Signature events are attended by 300+ investment professionals who are seeking thought-provoking content and quality networking opportunities. The Forecast Dinner features esteemed panels and future projections, ALTSLA, the West Coast's premier alternative investment all-day conference, and our latest conference, Portfolio which launched in 2019. It's a full day conference with 30+ speakers, immersive panel discussions, and insightful keynotes all talking

Topical Programs

- Current issues in the investment industry are presented virtually and in-person throughout the Los Angeles area. Previous presentations include topics on Wealth Management, Alternative Investments, Fintech, ESG and Ethical Decision Making and Behavioral Finance.

Continuing Education Programs

- Educational classes are available to members at a discounted rate. Courses have included Fixed Income Series, Mortgage Backed Securities Boot Camp, Data Science, Intro to Python, and Valuation and Modeling Boot Camps.

Career Development

- CFA Society Los Angeles has a job board that allows you to search for jobs in southern CA as well as globally. We regularly offer soft skill classes on speed reading, note taking, presentation skills, salary negotiations and leadership development. In the fall of 2023 we will offer our first virtual job fair.

Networking

- We organize a wide variety of networking activities including: hikes, axe throwing, pickleball tournaments, dolphin cruises, wine tasting and golf tournaments.

Opportunities for College Students

Investment Research Challenge

- CFA Society Los Angeles' Signature events are attended by 300+ investment professionals who are seeking thought-provoking content and quality networking opportunities. The Forecast Dinner features esteemed panels and future projections, ALTSLA, the West Coast's premier alternative investment all-day conference, and our latest conference, Portfolio which launched in 2019. It's a full day conference with 50 speakers, immersive panel discussions, and insightful keynotes all talking

Scholarships

- Beyond student scholarships CFA Institute also offers Access Scholarships and Women's Scholarships.

Free or Low Cost CFA Program Workshops and Boot Camps

- Our classes rotate throughout the year but we have historically offered free workshops in Ethics, GIPS, Test Taking and Study Tips and Level III Essay Writing. Additional boot camps have been offered in problem solving and accounting essentials.

Volunteer Opportunities

- CFA Society Los Angeles needs student volunteers to help at our annual golf tournament, forecast dinner and PORTFOLIO conference. Great opportunity to network and learn from financial experts.

Networking

- We organize a wide variety of networking activities including: hikes, axe throwing, pickle ball tournaments, dolphin cruises, wine tasting and golf tournaments.

CFA Society Los Angeles

Regular Membership (\$175 a Year)

- Affiliate Membership Requirements +
- Bachelor's degree or equivalent
- Pass Level I of the CFA exam, Level II of the CIPM exam or pass the self-administered Standards of Practice
- 4,000 hours of professional work experience

Affiliate Membership (\$175 a Year)

- Dual Membership with CFA institute and CFA Society Los Angeles
- Sign Professional Conduct Statement.

Associate Membership (\$175 a Year*)

- Local Membership
- Bachelor's degree or equivalent
- Can't have passed Level II
- * If you are an ACTIVE candidate currently enrolled in the CFA Program Level I or Level II Exam, you may be eligible for a discounted rate of \$50.

Student Membership (\$50 a Year)

- Local Membership
- Current Full Time Student at a University/College
- Can't have passed Level II



CFA Society
Los Angeles

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BECOME A CFA CHARTERHOLDER

WWW.CFAINSTITUTE.ORG

