

# CFA

# CHARTERED FINANCIAL ANALYST



finOptions Institute of Financial Studies Pvt. Ltd.

[www.finoptions.co](http://www.finoptions.co)

## What is Chartered Financial Analyst (CFA®)?

The Chartered Financial Analyst (CFA) Program is a professional credential offered by the CFA Institute (formerly AIMR) to investment and financial professionals. It is a valuable profession that certifies that the person who has it is having an in-depth knowledge of security types and investment. It also includes a thorough knowledge in quantitative methodologies for analyzing securities that is assessing their value and identify-in their underlying risks.

### Why CFA®?

A CFA® certificate is one of the highest awards conferred in the investment industry. It is an internationally recognized designation. Chartered Financial Analysts work for investment banks, mutual fund firms, hedge funds, brokerage houses,

boutique money managers. The CFA® designation represents the definitive mark of a competent financial analyst bound to the highest standards of ethical behavior. There are approximately 1,50,000 charter holders worldwide. A candidate who successfully completes the program and meets other professional requirements is awarded a "CFA charter" and becomes a "CFA charter holder."

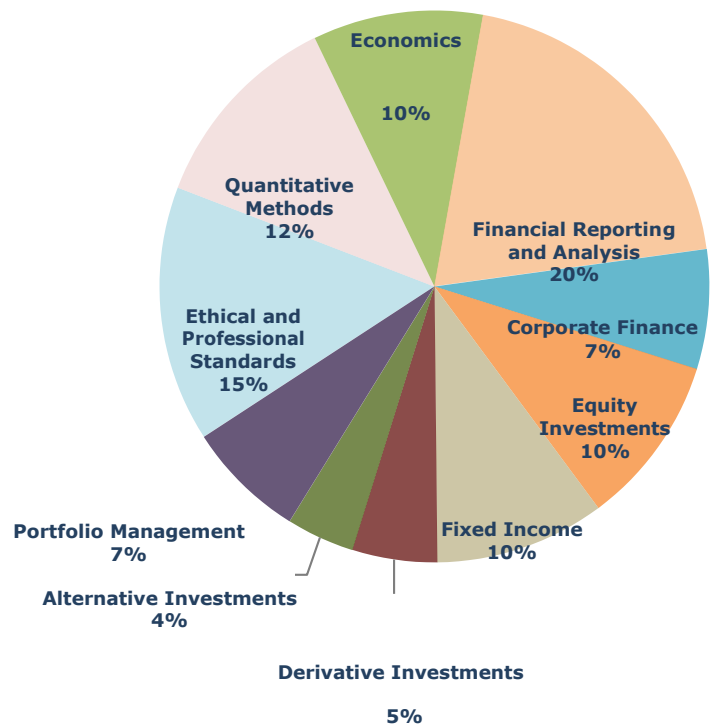
### Who should do CFA®?

Finance and investment professionals wanting to upgrade their skills in portfolio management, investment research, advisory services, or investment banking, and others who want to carve a niche for themselves in the field of financial accounting, management accounting, financial management (both as relevant to India and for the international scene), investment management, security evaluation, project planning, venture capital management and credit rating among other things.

## Contents of the Program

<b>Investment</b>	Quantitative Methods
	Financial Reporting & Analysis
<b>Tools</b>	Economics
	Corporate Issuers
	<b>Portfolio Management and Wealth Planning</b>
<b>Asset Classes</b>	Equity Investment
	Derivatives
	Fixed Income
	Alternative Investments
<b>Ethical and Professional Standards</b>	

## CFA Level – 1 Exams Topic Area Weight



*Globally Recognized | Economical | Prestigious Network*  
*Career Enhancement | Strong Ethical Foundation*

*There are currently more than 150000 CFAs worldwide.*



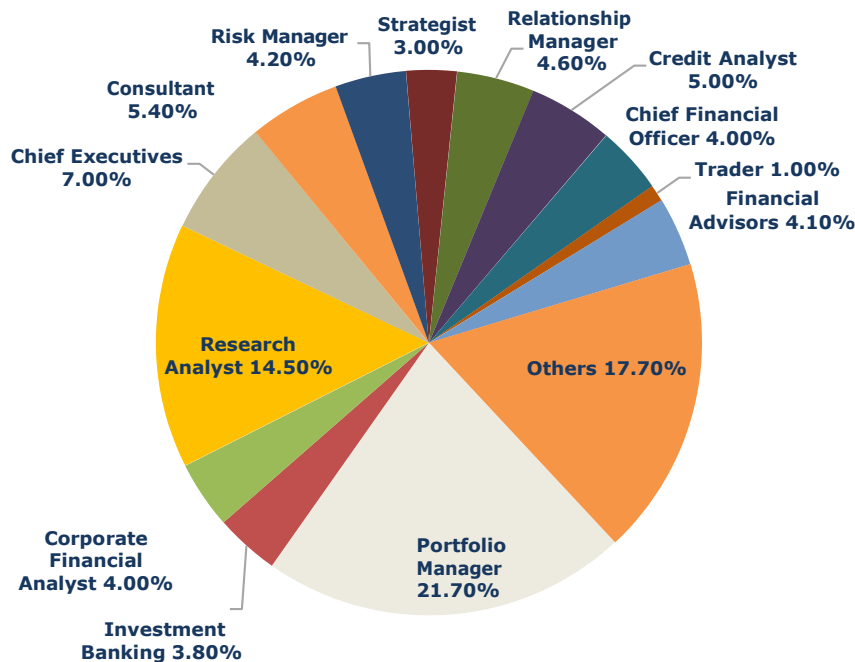
## Total Program Costs

All in all, you can expect the overall CFA exam fees to be \$2,400 to \$4,590:

(US\$)	Early	Standard
months before exam	8.5 months	3.5 months
Enrollment	\$450	\$450
Level 1	700	1000
Level 2	700	1000
Level 3	700	1000
<b>Total CFA program fees</b>	<b>\$2,400</b>	<b>\$3450</b>

Source: [www.cfainstitute.org](http://www.cfainstitute.org)

## Job Profiles for CFA Charter Holders



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To enroll in the **CFA** program and register for your first level 1 exam, you must have an international travel passport and one of the followings

Undergraduate education:

A bachelor's (or equivalent) degree or be in the final year of your bachelor's degree program

or

Work experience:

Four years of professional work experience (does not have to be investment related)

or

A combination of professional work experience and education that totals at least four years (part-time positions do not qualify, and the four-year total must be accrued prior to enrollment).

### The Road Map to Become Charter Holder



Pass All Level Three Levels of CFA Exams



+

Four years of professional work experience



2 - 3 Letters of Reference



New Charter holder

Source: [www.cfainstitute.org](http://www.cfainstitute.org)