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2022-01-13

BRYSON KENDAL

Investment Governance for Fiduciaries

Xlibris Corporation

A sobering account of a disenfranchised American working class and important policy solutions to the nation's economic inequalities. One of the country's leading scholars on economics and social policy, Isabel Sawhill addresses the enormous divisions in American society—economic, cultural, and political—and what might be done to bridge them. Widening inequality and the loss of jobs to trade and

technology has left a significant portion of the American workforce disenfranchised and skeptical of governments and corporations alike. And yet both have a role to play in improving the country for all. Sawhill argues for a policy agenda based on mainstream values, such as family, education, and work. While many have lost faith in government programs designed to help them, there are still trusted institutions on both the local and federal level that can deliver better job opportunities and higher wages to those who have been left behind. At the same time, the private sector needs to reexamine how it trains and rewards

employees. This book provides a clear-headed and middle-way path to a better-functioning society in which personal responsibility is honored and inclusive capitalism and more broadly shared growth are once more the norm. *CFA Program Curriculum 2020 Level III, Volumes 1 - 6* John Wiley & Sons. Two experienced and visionary authors show how institutions and individuals can go beyond conventional and sustainable investing to address complex problems such as income inequality and climate change on a deep, systemic level. It's time for a new way to think about investing, one that can contend with the complex

challenges we face in the 21st century. Investment today has evolved from the basic, conventional approach of the 1950s. Investors have since recognized the importance of sustainable investment and have begun considering environmental and social factors. Yet the complexity of the times forces us to recognize and transition to a third stage of investment practice: system-level investing. In this paradigm-shifting book, William Burckart and Steve Lydenberg show how system-level investors support and enhance the health and stability of the social, financial, and environmental systems on which they depend for long-term returns. They preserve and strengthen these fundamental systems while still generating competitive or otherwise acceptable performance. This book is for those investors who believe in that transition. They may be institutions, large or small, concerned about the long-term stability of the environment and society. They may be individual investors who want their children and grandchildren to inherit a just and sustainable world. Whoever they may be, Burckart and Lydenberg show them the what, why, and how of system-level

investment in this book: what it means to manage system-level risks and rewards, why it is imperative to do so now, and how to integrate this new way of thinking into their current practice.

Secure Retirement: Connecting Financial Theory and Human Behavior John Wiley & Sons

Wiley's 11th Hour Final Review Guide for 2017 Level I CFA Exam compacts all sixty readings tested on the 2017 CFA exam into one portable volume. Organized in order from Reading #1 to #60, this best-selling guide has helped thousands of candidates from over one-hundred countries pass the CFA exam. Designed to boil it all down to the crucial concepts, formulas and rules, this guide ensures candidates are familiar with the most important testable information. It's difficult to go over multiple books in the last few weeks before the exam, so Wiley's 11th Hour Review Guide does the work for you—condensing each reading down to two- to five pages. Enter the exam room with confidence and reinforce your knowledge and preparation! This comprehensive guide complements Wiley's CFA Study Guides sold separately

but may be used with any review course. An effective, efficient study guide, this book prepares you to reach the next level in your career. "The Eleventh Hour Review book is simply brilliant. Virtually every sentence it contains is testable— it's an absolute must-have for every Level I candidate." - Ameer, UK "The eleventh hour guide was a great help." - Konrad, South Africa "I used your eleventh hour guide and mock exams for the last bit of my studying and greatly enjoyed your material. Out of all of the exam prep material, I thought [yours] was the best." - Thomas, USA "Thanks to the team for writing the most intelligent Chartered Financial Analyst material I have seen to date. The eleventh hour guide is absolute genius and proving very valuable at this stage of the revision process." - Doug, UK and greatly enjoyed your material. Out of all of the exam prep material, I thought Elan's Yale University Press The chief investment officers (CIOs) at endowments, foundations, family offices, pension funds, and sovereign wealth funds are the leaders in the world of finance. They marshal trillions of dollars on behalf

of their institutions and influence how capital flows throughout the world. But these elite investors live outside of the public eye. Across the entire investment industry, few participants understand how these holders of the keys to the kingdom allocate their time and their capital. What's more, there is no formal training for how to do their work. So how do these influential leaders practice their craft? What skills do they require? What frameworks do they employ? How do they make investment decisions on everything from hiring managers to portfolio construction? For the first time, CAPITAL ALLOCATORS lifts the lid on this opaque corner of the investment landscape. Drawing on interviews from the first 150 episodes of the Capital Allocators podcast, Ted Seides presents the best of the knowledge, practical insights, and advice of the world's top professional investors. These insights include: - The best practices for interviewing, decision-making, negotiations, leadership, and management. - Investment frameworks across governance, strategy, process, technological innovation, and uncertainty. - The wisest and most impactful quotes

from guests on the Capital Allocators podcast. Learn from the likes of the CIOs at the endowments of Princeton and Notre Dame, family offices of Michael Bloomberg and George Soros, pension funds from the State of Florida, CalSTRS, and Canadian CDPQ, sovereign wealth funds of New Zealand and Australia, and many more. CAPITAL ALLOCATORS is the essential new reference manual for current and aspiring CIOs, the money managers that work with them, and everyone allocating a pool of capital.

Contributing to Society in a Conflicted Industry Harriman House Limited
 "A rare blend of a well-organized, comprehensive guide to portfolio management and a deep, cutting-edge treatment of the key topics by distinguished authors who have all practiced what they preach. The subtitle, *A Dynamic Process*, points to the fresh, modern ideas that sparkle throughout this new edition. Just reading Peter Bernstein's thoughtful Foreword can move you forward in your thinking about this critical subject." —Martin L. Leibowitz, Morgan Stanley "Managing Investment Portfolios remains the definitive volume in

explaining investment management as a process, providing organization and structure to a complex, multipart set of concepts and procedures. Anyone involved in the management of portfolios will benefit from a careful reading of this new edition." —Charles P. Jones, CFA, Edwin Gill Professor of Finance, College of Management, North Carolina State University

A Dynamic Process Penguin

The health and well-being of Asians took a battering during the coronavirus disease (COVID-19) pandemic. Wellness, or the active pursuit of activities for holistic health, is vital for a sound mind and body. As such, now is an opportune time to take stock of the current state of wellness and the wellness economy in Asia. Asians are blessed with rich wellness traditions they can leverage in their quest for mental and physical health. This timely book examines the key drivers of the demand for wellness in the region. It also sets out concrete policy options for promoting wellness among all Asians.

CFA Program Curriculum 2020 Level II Volumes 1-6 Box Set Oxford University Press

The complete guide to derivatives, from the experts at the CFA Derivatives is the definitive guide to derivatives, derivative markets, and the use of options in risk management. Written by the experts at the CFA Institute, this book provides authoritative reference for students and investment professionals seeking a deeper understanding for more comprehensive portfolio management. General discussion of the types of derivatives and their characteristics gives way to detailed examination of each market and its contracts, including forwards, futures, options, and swaps, followed by a look at credit derivatives markets and their instruments. Included lecture slides help bring this book directly into the classroom, while the companion workbook (sold separately) provides problems and solutions that align with the text and allows students to test their understanding while facilitating deeper internalization of the material. Derivatives have become essential to effective financial risk management, and create synthetic exposure to asset classes. This book builds a conceptual framework for understanding derivative fundamentals, with systematic

coverage and detailed explanations. Understand the different types of derivatives and their characteristics Delve into the various markets and their associated contracts Examine the use of derivatives in portfolio management Learn why derivatives are increasingly fundamental to risk management The CFA Institute is the world's premier association for investment professionals, and the governing body for the CFA, CIPM, and Investment Foundations Programs. Those seeking a deeper understanding of the markets, mechanisms, and use of derivatives will value the level of expertise CFA lends to the discussion, providing a clear, comprehensive resource for students and professionals alike. Whether used alone or in conjunction with the companion workbook, Derivatives offers a complete course in derivatives and their markets.

Managing Investment Portfolios CFA Institute Research Foundation This "primer," written as if addressed to a new investment trustee for a university, is a comprehensive discussion of investment issues relevant not only to investment trustees but also to investment

professionals who work with trustees. Taking an individual step by step through the process of responsible trusteeship, it offers a solid introduction to basic investment principles.

A Primer for Investment Trustees John Wiley & Sons

Final Review Guide for Level II CFA Exam Wiley's 11th Hour Final Review Guide for 2017 Level II CFA Exam compacts all fifty-two readings tested on the 2017 CFA exam into one portable volume. Organized in order from Reading #1 to #52, this best-selling guide has helped thousands of candidates from over one-hundred countries pass the CFA exam. Designed to boil it all down to the crucial concepts, formulas and rules, this guide ensures candidates are familiar with the most important testable information. It's difficult to go over multiple books in the last few weeks before the exam, so Wiley's 11th Hour Final Review Guide does the work for you—condensing each reading down to two- to five pages. Enter the exam room with confidence and reinforce your knowledge and preparation! This comprehensive guide complements Wiley's CFA Study Guides sold separately

but may be used with any review course. An effective, efficient study guide, this book prepares you to reach the next level in your career. Passing the Level II exam is the only way to sit for the third and final examination associated with the CFA designation, so it is imperative that you leverage the most effective study materials when preparing for your Level II exam. Access targeted, relevant information in a condensed form Efficiently optimize your study time with high-impact notes Achieve clearer understanding via comments and tips from trusted instructors Review the most important concepts and formulas Wiley 's 11th Hour Guide for 2017 Level II CFA Exam is an essential resource for CFA candidates preparing to take the Level II examination. "The Eleventh Hour Review book is simply brilliant. Virtually every sentence it contains is testable— it's an absolute must-have for every Level I candidate." - Ameer, UK "The eleventh hour guide was a great help." - Konrad, South Africa "I used your eleventh hour guide and mock exams for the last bit of my studying and greatly enjoyed your material. Out of all of the exam prep material, I thought [yours] was

the best." - Thomas, USA "Thanks to the team for writing the most intelligent Chartered Financial Analyst material I have seen to date. The eleventh hour guide is absolute genius and proving very valuable at this stage of the revision process." - Doug, UK

CFA Program Curriculum 2017 Level I John Wiley & Sons

Master the practical aspects of the CFA Program Curriculum with expert instruction for the 2017 exam The same official curricula that CFA Program candidates receive with program registration is now publicly available for purchase. CFA Program Curriculum 2017 Level II, Volumes 1-6 provides the complete Level II Curriculum for the 2017 exam, with practical instruction on the Candidate Body of Knowledge (CBOK) and how it is applied, including expert guidance on incorporating concepts into practice. Level II focuses on complex analysis with an emphasis on asset valuation, and is designed to help you use investment concepts appropriately in situations analysts commonly face. Coverage includes ethical and professional standards, quantitative analysis,

economics, financial reporting and analysis, corporate finance, equities, fixed income, derivatives, alternative investments, and portfolio management organized into individual study sessions with clearly defined Learning Outcome Statements. Charts, graphs, figures, diagrams, and financial statements illustrate complex concepts to facilitate retention, and practice questions with answers allow you to gauge your understanding while reinforcing important concepts. While Level I introduced you to basic foundational investment skills, Level II requires more complex techniques and a strong grasp of valuation methods. This set dives deep into practical application, explaining complex topics to help you understand and retain critical concepts and processes. Incorporate analysis skills into case evaluations Master complex calculations and quantitative techniques Understand the international standards used for valuation and analysis Gauge your skills and understanding against each Learning Outcome Statement CFA Institute promotes the highest standards of ethics, education, and professional excellence among investment professionals. The CFA

Program Curriculum guides you through the breadth of knowledge required to uphold these standards. The three levels of the program build on each other. Level I provides foundational knowledge and teaches the use of investment tools; Level II focuses on application of concepts and analysis, particularly in the valuation of assets; and Level III builds toward synthesis across topics with an emphasis on portfolio management.

An Economic Agenda for a Divided Nation CFA Institute Research Foundation Master the practical aspects of the CFA Program curriculum with expert instruction for the 2019 exam The same official curricula that CFA Program candidates receive with program registration is now publicly available for purchase. CFA Program Curriculum 2019 Level II, Volumes 1-6 provides the complete Level II curriculum for the 2019 exam, with practical instruction on the Candidate Body of Knowledge (CBOK) and how it is applied, including expert guidance on incorporating concepts into practice. Level II focuses on complex analysis with an emphasis on asset valuation, and is designed to help you use investment

concepts appropriately in situations analysts commonly face. Coverage includes ethical and professional standards, quantitative analysis, economics, financial reporting and analysis, corporate finance, equities, fixed income, derivatives, alternative investments, and portfolio management organized into individual study sessions with clearly defined Learning Outcome Statements. Charts, graphs, figures, diagrams, and financial statements illustrate complex concepts to facilitate retention, and practice questions with answers allow you to gauge your understanding while reinforcing important concepts. While Level I introduced you to basic foundational investment skills, Level II requires more complex techniques and a strong grasp of valuation methods. This set dives deep into practical application, explaining complex topics to help you understand and retain critical concepts and processes. Incorporate analysis skills into case evaluations Master complex calculations and quantitative techniques Understand the international standards used for valuation and analysis Gauge your skills and understanding against each

Learning Outcome Statement CFA Institute promotes the highest standards of ethics, education, and professional excellence among investment professionals. The CFA Program curriculum guides you through the breadth of knowledge required to uphold these standards. The three levels of the program build on each other. Level I provides foundational knowledge and teaches the use of investment tools; Level II focuses on application of concepts and analysis, particularly in the valuation of assets; and Level III builds toward synthesis across topics with an emphasis on portfolio management.

[CFA Program Curriculum 2019 Level III Volumes 1-6 Box Set](#) Cambridge University Press

Apply CFA Program concepts and skills to real-world wealth and portfolio management for the 2019 exam The same official curricula that CFA Program candidates receive with program registration is now publicly available for purchase. CFA Program Curriculum 2019 Level III, Volumes 1-6 provides complete, authoritative guidance on synthesizing the entire CFA Program Candidate Body of Knowledge (CBOK) into professional

practice for the 2019 exam. This book helps you bring together the skills and concepts from Levels I and II to formulate a detailed, professional response to a variety of real-world scenarios. Coverage spans all CFA Program topics and provides a rigorous treatment of portfolio management, all organized into individual study sessions with clearly defined Learning Outcome Statements. Visual aids clarify complex concepts, and practice questions allow you to test your understanding while reinforcing major content areas. Levels I and II equipped you with foundational investment tools and complex analysis skill; now, you'll learn how to effectively synthesize that knowledge to facilitate effective portfolio management and wealth planning. This study set helps you convert your understanding into a professional body of knowledge that will benefit your clients' financial futures. Master essential portfolio management and compliance topics Synthesize your understanding into professional guidance Reinforce your grasp of complex analysis and valuation Apply ethical and professional standards in the context of real-world cases CFA

Institute promotes the highest standards of ethics, education, and professional excellence among investment professionals. The CFA Program curriculum guides you through the breadth of knowledge required to uphold these standards. The three levels of the program build on each other. Level I provides foundational knowledge and teaches the use of investment tools; Level II focuses on application of concepts and analysis, particularly in the valuation of assets; and Level III builds toward synthesis across topics with an emphasis on portfolio management.

CFA Program Curriculum 2018 Level III CFA Institute Research Foundation Behavioral finance presented in this book is the second-generation of behavioral finance. The first generation, starting in the early 1980s, largely accepted standard finance's notion of people's wants as "rational" wants—restricted to the utilitarian benefits of high returns and low risk. That first generation commonly described people as "irrational"—succumbing to cognitive and emotional errors and misled on their way to their rational wants. The second

generation describes people as normal. It begins by acknowledging the full range of people's normal wants and their benefits—utilitarian, expressive, and emotional—distinguishes normal wants from errors, and offers guidance on using shortcuts and avoiding errors on the way to satisfying normal wants. People's normal wants include financial security, nurturing children and families, gaining high social status, and staying true to values. People's normal wants, even more than their cognitive and emotional shortcuts and errors, underlie answers to important questions of finance, including saving and spending, portfolio construction, asset pricing, and market efficiency.

Wiley 11th Hour Guide for 2017 Level I CFA Exam John Wiley & Sons

Clear, concise instruction for all CFA Program Level I concepts and competencies for the 2020 exam The same official curricula that CFA Program candidates receive with program registration is now publicly available for purchase. CFA Program Curriculum 2020 Level I, Volumes 1-6 provides the complete Level I curriculum for the 2020

exam, delivering the Candidate Body of Knowledge (CBOK) with expert instruction on all 10 topic areas of the CFA Program. Fundamental concepts are explained in-depth with a heavily visual style, while cases and examples demonstrate how concepts apply in real-world scenarios. Coverage includes ethical and professional standards, quantitative analysis, economics, financial reporting and analysis, corporate finance, equities, fixed income, derivatives, alternative investments, and portfolio management, all organized into individual sessions with clearly defined Learning Outcome Statements. Charts, graphs, figures, diagrams, and financial statements illustrate concepts to facilitate retention, and practice questions provide the opportunity to gauge your understanding while reinforcing important concepts. Learning Outcome Statement checklists guide readers to important concepts to derive from the readings. Embedded case studies and examples throughout demonstrate practical application of concepts. Figures, diagrams, and additional commentary make difficult concepts accessible. Practice problems support

learning and retention. CFA Institute promotes the highest standards of ethics, education, and professional excellence among investment professionals. The CFA Program curriculum guides you through the breadth of knowledge required to uphold these standards.

CFA Program Curriculum 2019 Level II Volumes 1-6 Box Set John Wiley & Sons

American workers rely on their employers to provide a way to generate retirement income beyond their Social Security earnings. Many employers still offer traditional defined benefit (DB) pension plans. A growing majority, however, have replaced DB plans with account-based defined contribution (DC) plans. Virtually everyone acknowledges that the basic DC plan design is flawed. Yet as a society with low private savings and a fraying Social Security system, we count on this imperfect structure to serve as a retirement security bulwark. Workers and society both need the employer-sponsored retirement system to function well. Enhancing DC plan design therefore becomes critical. *Defined Contribution Plans: Challenges and Opportunities for Plan Sponsors* offers guidance to plan

sponsors interested in better understanding the primary issues confronting DC plans. We wrote this book from the viewpoint of the plan sponsor seeking to improve the DC system, and it follows five major themes: the plan participant, the plan sponsor, plan design, investments and investment managers, and asset decumulation in retirement. We present the material conversationally from a high-level perspective. We have not sought to write an encyclopedia on DC plans but rather focus on the basic features of well-run plans. We address key challenges facing DC plans and offer associated design and policy recommendations for plan sponsors and other interested parties to consider. Plan design improvements almost certainly will be incremental, rather than sweeping top-down changes mandated by regulators. Plan sponsors individually will make the important decisions that have lasting consequences for participants and for society. Our objective is to spark interest among sponsors, encouraging them to carry out additional research and take action. We believe the DC system will be strengthened by informed sponsors

advocating for and implementing thoughtful strategic changes to their plans.

International Financial Statement Analysis, Third Edition (CFA Institute Investment Series) John Wiley & Sons

Master the practical aspects of the CFA Program curriculum with expert instruction for the 2020 exam. The same official curricula that CFA Program candidates receive with program registration is now publicly available for purchase. CFA Program Curriculum 2020 Level II, Volumes 1-6 provides the complete Level II curriculum for the 2020 exam, with practical instruction on the Candidate Body of Knowledge (CBOK) and how it is applied, including expert guidance on incorporating concepts into practice. Level II focuses on complex analysis with an emphasis on asset valuation, and is designed to help you use investment concepts appropriately in situations analysts commonly face. Coverage includes ethical and professional standards, quantitative analysis, economics, financial reporting and analysis, corporate finance, equities, fixed income, derivatives, alternative

investments, and portfolio management organized into individual study sessions with clearly defined Learning Outcome Statements. Charts, graphs, figures, diagrams, and financial statements illustrate complex concepts to facilitate retention, and practice questions with answers allow you to gauge your understanding while reinforcing important concepts. While Level I introduced you to basic foundational investment skills, Level II requires more complex techniques and a strong grasp of valuation methods. This set dives deep into practical application, explaining complex topics to help you understand and retain critical concepts and processes. Incorporate analysis skills into case evaluations. Master complex calculations and quantitative techniques. Understand the international standards used for valuation and analysis. Gauge your skills and understanding against each Learning Outcome Statement. CFA Institute promotes the highest standards of ethics, education, and professional excellence among investment professionals. The CFA Program curriculum guides you through the breadth of knowledge required to uphold these standards. The three levels

of the program build on each other. Level I provides foundational knowledge and teaches the use of investment tools; Level II focuses on application of concepts and analysis, particularly in the valuation of assets; and Level III builds toward synthesis across topics with an emphasis on portfolio management.

Derivatives John Wiley & Sons

A Primer for Investment Trustees
CFA Program Curriculum 2017 Level II, Volumes 1 - 6
John Wiley & Sons

Forgotten Americans A Primer for Investment Trustees
CFA Program Curriculum 2017 Level II, Volumes 1 - 6
Since the Global Financial Crisis, a surge of interest in the use of finance as a tool to address social and economic problems suggests the potential for a generational shift in how the finance industry operates and is perceived. J.C. de Swaan seeks to channel the forces of well-intentioned finance professionals to improve finance from within and help restore its focus on serving society. Drawing from inspiring individuals in the field, de Swaan proposes a framework for pursuing a viable career in finance while benefiting society and upholding humanistic values. In doing so,

he challenges traditional concepts of success in the industry. This will also engage readers outside of finance who are concerned about the industry's impact on society.

Future State of the Investment Profession
Simon and Schuster

Apply CFA Program concepts and skills to real-world wealth and portfolio management for the 2018 exam The same official curricula that CFA Program candidates receive with program registration is now publicly available for purchase. CFA Program Curriculum 2018 Level III, Volumes 1-6 provides complete, authoritative guidance on synthesizing the entire CFA Program Candidate Body of Knowledge (CBOK) into professional practice for the 2018 exam. This book helps you bring together the skills and concepts from Levels I and II to formulate a detailed, professional response to a variety of real-world scenarios. Coverage spans all CFA Program topics and provides a rigorous treatment of portfolio management, all organized into individual study sessions with clearly defined Learning Outcome Statements. Visual aids clarify complex concepts, and practice

questions allow you to test your understanding while reinforcing major content areas. Levels I and II equipped you with foundational investment tools and complex analysis skill; now, you'll learn how to effectively synthesize that knowledge to facilitate effective portfolio management and wealth planning. This study set helps you convert your understanding into a professional body of knowledge that will benefit your clients' financial futures. Master essential portfolio management and compliance topics Synthesize your understanding into professional guidance Reinforce your grasp of complex analysis and valuation Apply ethical and professional standards in the context of real-world cases CFA Institute promotes the highest standards of ethics, education, and professional excellence among investment professionals. The CFA Program Curriculum guides you through the breadth of knowledge required to uphold these standards. The three levels of the program build on each other. Level I provides foundational knowledge and teaches the use of investment tools; Level II focuses on application of concepts and

analysis, particularly in the valuation of assets; and Level III builds toward synthesis across topics with an emphasis on portfolio management.

Handbook on Sustainable Investments: Background Information and Practical Examples for Institutional Asset Owners
John Wiley & Sons

Apply CFA Program concepts and skills to real-world wealth and portfolio management for the 2019 exam The same official curricula that CFA Program candidates receive with program registration is now publicly available for purchase. CFA Program Curriculum 2020 Level III, Volumes 1-6 provides complete, authoritative guidance on synthesizing the entire CFA Program Candidate Body of Knowledge (CBOK) into professional practice for the 2020 exam. This book helps you bring together the skills and concepts from Levels I and II to formulate a detailed, professional response to a variety of real-world scenarios. Coverage spans all CFA Program topics and provides a rigorous treatment of portfolio management, all organized into individual study sessions with clearly defined Learning Outcome Statements. Visual aids

clarify complex concepts, and practice questions allow you to test your understanding while reinforcing major content areas. Levels I and II equipped you with foundational investment tools and complex analysis skill; now, you'll learn how to effectively synthesize that knowledge to facilitate effective portfolio management and wealth planning. This study set helps you convert your understanding into a professional body of

knowledge that will benefit your clients' financial futures. Master essential portfolio management and compliance topics Synthesize your understanding into professional guidance Reinforce your grasp of complex analysis and valuation Apply ethical and professional standards in the context of real-world cases CFA Institute promotes the highest standards of ethics, education, and professional excellence among investment professionals. The CFA Program curriculum

guides you through the breadth of knowledge required to uphold these standards. The three levels of the program build on each other. Level I provides foundational knowledge and teaches the use of investment tools; Level II focuses on application of concepts and analysis, particularly in the valuation of assets; and Level III builds toward synthesis across topics with an emphasis on portfolio management.