

# Chartered Financial Analyst (CFA®) Preparation Courses

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six day preparation courses for all three levels

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in depth teaching of the key areas of the exam that delegates find difficult

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problem solving techniques and test questions

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extensive study materials

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access to further Schweser study materials at reduced prices

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exclusive cooperation with CFA Society Austria

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## Information and registration

[www.controller-institut.at](http://www.controller-institut.at)

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### THE PARTICIPATION FEE INCLUDES:

Course materials, welcome coffee, lunch, soft drinks, snacks break

### PROGRAMM-MANAGEMENT



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### GENERAL TERMS AND CONDITIONS (GTC)

The General Terms and Conditions (GTC) of the Controller Institute are available online: [www.controller-institut.at/agb](http://www.controller-institut.at/agb). On request we will send you a written version.

# CFA® – the gold standard in finance education



Paul Knight, CFA  
CFA® program tutor at Kaplan  
Financial

The Chartered Financial Analyst (CFA®) credential has become the most respected and valued credential in the global finance community. The CFA® qualification has set the standard for professionalism and quality and is a long-term investment into the careers of each graduate.

Currently there are more than 90,000 CFA® charterholders working around the world. Holding the CFA® charter illustrates the required endurance, flexibility and hard working mentality, which is required in the fast – evolving global financial industry.

To extent the publicity in Austria, the Controller Institute has established an exclusive cooperation with CFA Society Austria, the Austrian chapter of the international CFA Institute. This association represents all CFA®s and sets international standards for professionalism and ethical behavior in the financial industry.

For the CFA® Program the candidates have to succeed three exams/levels (Level I, Level II, Level III) in the predefined order. The CFA Institute recommends a minimum of 300 hours of preparation per-level. Results from the past have shown that self-study may not be enough to succeed on the CFA® exam. Candidates need guidance to focus on the important topics, expert instructors – and perfectly structured study materials.

Controller Institute and CFA Society Austria thus offer a **comprehensive study solution**, which provides a perfect framework for a successful CFA® exam. This solution consists of excellent preparation courses and effective study packages.

High satisfaction rates of delegates having attended these preparation courses show the success of this program – measured both in terms of effectiveness and efficiency of preparations as well as achieved results in the CFA® exams. I would be glad to welcome you in one of our courses and help you on your way to the CFA®!

# CFA® Preparation Courses

## (Level I, Level II, Level III)

Each six day preparation course (Level I, Level II, Level III) concentrates on exam preparation and intensive test training. The experienced instructor provides an overview of all relevant exam areas and focusses on problem solving techniques and test questions.

### DATES

#### CFA® Preparation Course Level 1

Spring 15.03. – 17.03. and 19.04. – 21.04.2015

Autumn 27.09. – 29.09. and 18.10. – 20.10.2015

#### CFA® Preparation Course Level 2

Spring 22. – 24.02. and 16.04. – 28.04.2015

#### CFA® Preparation Course Level 3

Spring 15.02. – 17.02.2015 and 22.03. – 24.03.2015

### COURSE FEE FOR EACH LEVEL

EUR 1800 exkl. VAT

### TAX DEDUCTION AND FUNDING

Training costs (cost fees, literature and also necessary travel cost) are claimed as “advertising costs” in the context of employee assessment, if the expenses are paid by the employees. These costs are deducted before calculating the tax, which leads to wage tax savings. Therefore, up to 50% of the training costs could be retracted.

[www.controller-institut.at/de/service/bildungsfoerderung/](http://www.controller-institut.at/de/service/bildungsfoerderung/)

please visit our website to get further information about possibilities for grants

In cooperation with



**CFA Society  
Austria**



“The course was well structured and our trainer was super efficient. We went through all relevant areas and had enough time to raise questions or discuss complex topics. In the training I got not only an idea about the main areas to focus on but also how to prepare for the exam and to tackle multiple choice questions under time pressure. The CFA® preparation course has been of great advantage and I felt well prepared for the exam.”

**Doris Hirzi**, Raiffeisen Bank International AG, Vienna

### Targets and principles of teaching

- In each level of the preparation courses we offer clear and comprehensive study notes that cover all of the required Learning Outcomes (LOS).
- The covered topics are taught in an easy-to-understand and effective way, which supports remembering such enormous information as simple as possible.
- Classroom slides refer to the CFA Institute Curriculum and also to the Schweser Notes. This improves transparency and provides the possibility of combining different study materials.
- The experienced instructor shows methods and techniques which are helpful for answering the tough, multiple-choice questions in the short time.
- Question-and-answer session plus the exchange with other delegates are also part of the preparation course.

### Participants

This intensive workshop addresses all candidates who have already started with preparation and want to take the exam soon. To benefit most from the course, the participants already need to be familiar with the content, but the course assumes no prior knowledge. This course does not compensate for this learning investment, but helps you to translate your learning efforts into the best test result.

### Content

## Preparation Course – CFA® Level I

The CFA® Level I exam contains comprehensive questions, focusing on investment valuation and portfolio management. Besides you have to be aware of how these processes fit within the guidelines of the CFA Institute Code of Ethics and Standards of Professional Conduct. The CFA® Level I exam is an extremely challenging test – excellent knowledge and time management skills are key.

### Agenda

1 <sup>st</sup> day	Quantitative Methods	5 <sup>th</sup> day	Corp Fin/Port Man/Equity/ Fixed Income
2 <sup>nd</sup> day	Quantitative Methods and Economics		
3 <sup>rd</sup> day	Economics/FRA SS7&8	6 <sup>th</sup> day:	Fixed Income/Derivatives
4 <sup>th</sup> day	FRA SS9		

## Preparation Course – CFA® Level II

CFA® Level II requires an intensive level of understanding of the tools and techniques which were part of the Level I curriculum. Besides candidates are expected to demonstrate applications in asset valuation within the context of the Code of Ethics and Standards of Professional Conduct.

### Agenda

1 <sup>st</sup> day:	Quantitative Methods and Economics	4 <sup>th</sup> day:	Equity
2 <sup>nd</sup> day:	Economics/FRA	5 <sup>th</sup> day:	Fixed Income/Alts/Derivatives
3 <sup>rd</sup> day:	FRA/Corporate Finance	6 <sup>th</sup> day:	Derivatives/Portfolio Management

## Preparation Course – CFA® Level III

The CFA® Level III exam concentrates on the curriculum from Level I and Level II and is applying it to real-life situations. The analytical methods and all the concepts are combined and are tested in a range of applications for effective portfolio management and wealth planning.

### Agenda

1 <sup>st</sup> day:	Introduction to the L3 Behavioural Finance Portfolio Management – Private Wealth
2 <sup>nd</sup> day:	Portfolio Management – Private Wealth (continued) Portfolio Management – Institutional Economics Asset Allocation
3 <sup>rd</sup> day:	Asset Allocation (continued) Fixed Income part 1
4 <sup>th</sup> day:	Derivatives Trading, Monitoring & Rebalancing
5 <sup>th</sup> day:	Trading, Monitoring & Rebalancing (Contd.)
6 <sup>th</sup> day:	Performance Evaluation Overview of Alternative Investments Introduction to GIPS

## Effective study packages

### Classroom materials

The preparation course price includes perfectly structured study materials which focus on the important learning outcomes (LOS) – for detail information see page 5.

### Additional Schweser Packages

For additional preparation, delegates of all levels (Level I, Level II, Level III) can order further studying materials from Schweser at a reduced price. Please note that the mentioned prices are only available for the course participants. They are able to order these packages after registering to the preparation courses.

- 1.) **Schweser Essential Package** (EUR 560\*): This is a comprehensive package of hardy copy and online resources which will support delegates with the 300 hours of home study recommended by the CFA® Institute
- 2.) **Schweser Kaplan Financial Premium Package** (EUR 647\*): This comprises all components of the Essential Package as well as on-demand video instruction which is used to complement and supplement our face to face expert instruction
- 3.) **Schweser Premium Package** (EUR 948\*): This package not only includes the on-demand video instruction but also has a live online tuition course so you can go back and view a whole class at a time to suit you

\*plus EUR 90 delivery charge (hard copy resources are shipped from the USA)

Please note that the above mentioned prices for the packages are valid at the moment (February 2015) and might be subject to changes in the future; furthermore, due to changing exchange rate further effects on the prices stated above might be possible.

Schweser recommends the 'Kaplan Financial Premium Package' as delegates already have live classes in the preparation courses.

For further information on prices and contents of the study materials please do not hesitate to contact us or visit the website of Schweser: [www.schweser.com](http://www.schweser.com)



“The CFA® preparation course at Controller Institute not only helped me to structure and process the extensive curriculum, but also gave me the competitive edge for this challenging exam. Thanks to the focus on key topic areas and the elaborate exam strategies, I was able to pass the exams on the first attempt.”

**Philipp Prassl, MSc**, U&W Radiologie Management GmbH, Vienna

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