

# STUDY THE 2021 CFA® PROGRAM!

BECOME YOUR VISION: A CHARTERED FINANCIAL ANALYST® CHARTERHOLDER



/// Study Options | Fees | Timetables ///

**SANDTON (CBD) CAMPUS & ONLINE**



**OTHER CAMPUSES:**  
SANDTON RIVONIA | PRETORIA | PARKTOWN

© WhatsApp: 063 180 7412 | Email: [enquiries@charterquest.co.za](mailto:enquiries@charterquest.co.za)  
Tel: 0861 131 137

# Classes for the CFA® Program Exam: At the heart of Sandton.

## Sandton CBD Campus:

36 Wierda Road (Hunts End Building)  
Wierda Valley  
(10 min walk from Gautrain and behind  
new Discovery Health Building )  
SANDTON  
Tel: 0861 131 137  
Whats App line: 063 180 7412  
Email: [enquiries@charterquest.co.za](mailto:enquiries@charterquest.co.za)



## Facilities:



Accessible  
Location  
with FREE WIFI



Secure &  
Free Parking



Modern  
Classroom  
Facilities



Computer Lab  
with  
Internet connectivity

# What/Why CFA® Charter & How Can We Help?



"Administered by the US-based CFA Institute, the Chartered Financial Analyst® (CFA®) Program is a graduate-level and globally recognised program for investment specialists. The resulting professional credential/designation assures clients, employers, and colleagues that you as a charterholder, have mastered a rigorous finance and investment management curriculum; further that you are committed to the highest ethical standards in the profession. It is indeed, the most sought-after qualification by South African employers in the corporate finance and investments space.

## Program Structure & Syllabus:

The CFA® Program is structured into 3 challenging levels:

- Level I (knowledge and understanding of investment tools and techniques);
- Level II (application of investment tools and techniques to asset valuation)&
- Level III (synthesis and evaluation of investment tools and techniques in the context of portfolio management and wealth planning).

**The above 3 levels are** underpinned by a network of progressively challenging Learning Outcome Statements (LOSs), founded on 10 syllabus topic areas:

- (1) Ethics & Professional Standards;
- (2) Quantitative Methods;
- (3) Economics;
- (4) Financial Reporting & Analysis;
- (5) Corporate Finance;
- (6) Equity Investments;
- (7) Fixed Income;
- (8) Derivatives;
- (9) Alternative Investments; and
- (10) Portfolio Management and Wealth Planning.

## Exam Format & Schedules:

From 2021, all CFA® Exams will be computer-based, under the following scheduling windows:

For Level I: 4 times a year: February, May, August and November;

For Level II: Twice a year: May and August; and

For Level III: Twice a year: May and November.

Level I exams will be 5 hours, split into two 2.25 hour sessions. Level II and III will also be 2.25 hour session (more detail as to number of sessions to follow).

## Exemptions & Eligibility:

Irrespective of your prior qualification and/or experience, you cannot apply for exemption from any Level of the CFA® Program. To be eligible to start at Level I, you must either:

- Hold a bachelor's (or equivalent) degree, or
- Be in the final year of your bachelor's (or equivalent) degree, and/or
- Have four years of work experience (not necessarily investment related).

Please note: Although four years of work experience which is not necessarily-invested related will grant you eligibility, you will be required to submit three years of relevant work experience before being accorded the CFA Charter. This relevant experience you can gain before, during or after completing all the relevant CFA exams."

**D. Valentine Nti**  
Founding Chief Executive

# Study Options, Packages & Fees

Choose between 3 study packages (Tuition & Exam Preparation Package (TEPP) -Evenings or Weekends; Exam Preparation Only Package (EPOP) -Evenings or Weekends; or Livestream Interactive+ (Online)). You have the flexibility to attend our Full course (comprising of all 5 books/modules -at each level), and/or our exam preparation classes. For example, selecting TEPP will allow you to attend all 20 classes (over 20 weeks), covering all 5 books/modules (including 4 exam revision practice workshops); or, you can choose to only pay for and attend the scheduled 2-8 classes (including 4 revisions classes) that will be covering your specific books (modules) of interest. The tables below provide further details of each study package, the indicative benefits and course fees.

## Indicative Course Benefits For All Levels (I, II & III)

	TEPP Weekends/Evenings	EPOP Weekends/Evenings	Livestream Interactive +
Level I	R 19 000	R 11 000	R 13 000
Level II	R 19 000	R 11 000	R 13 000
Level III	R 19 000	R 11 000	R 13 000

### BENEFITS GRID

\* Get this for as low as **R17 500** if you enrol by 30th September. Get Quote here: [https://www.charterquest.co.za/enrolment\\_book](https://www.charterquest.co.za/enrolment_book)  
Payment Terms : 20% deposit and balance payable over 6 months.

<u>1st Time Pass Guarantee</u>	✓	✗	✓
20 Face-to-Face Contact Classes (80 hours) {16 Tuition and 4 Revision Classes}	✓	✗	✓
Module by Module: 2-8 classes (Including 4 revision classes)	✓	✓	✓
<b>Study Materials Provided</b>			
- <b>STUDY NOTES:</b> Clear, concise study notes (Schwester Notes) & examples that cover every Learning Outcome Statements (LOS), plus questions to check your understanding: <b>PLUS</b> detailed scheme of work.	✓	✗	✓
- <b>PRACTICE TOOLS 1:</b> Schwester Pro Question Bank (to quiz yourself and build custom exams based on LOS).	✓	✓	✓
- CQ Lecture Videos & Slides accessible via your CQ students portal.	✓	✗	✓
<b>Mock Resources Provided:</b>			
- <b>PRACTICE TOOLS 2:</b> Multiple 3-9 Online Practice Mock Exams (to help you perform on exam day, depending on your performance tracking).	✓	✓	✓
- <b>BONUS:</b> Online access to over 1000 additional exam practice questions.	✓	✓	✓
<b>Additional Benefits</b>			
- <b>PRACTICE TOOLS 3:</b> Schwester Quicksheet -(to help you develop a detailed study plan that shows you how to use your study materials in the most effective way possible).	✓	✓	✓
- The CFA® Program recommended financial calculator ( <b>BAII Plus Professional -Texas Instruments</b> )	✓	✗	✗
- Instructor-Led Office Hours (Ask questions during an instructor's set office hours)	✓	✗	✓
- Student File - Customised CFA Student File	✓	✗	✗

Download Timetables Online on: [https://www.charterquest.co.za/time\\_table](https://www.charterquest.co.za/time_table)

\*Excluding registration and exam fees -this costs US\$1000 - US\$1500, depending on how early you register (you can include this on your quotation or pro forma invoice during online enrolment with CharterQuest)



# **BECOME** **YOUR VISION:** **A CHARTERED PROFESSIONAL**



**Charter**  
**Quest**

*Grooming financially  
qualified business leaders*



## **WITH**

- ACCA
- CIMA
- CFA® Charter
- SAICA
- ACT
- IIA
- UNISA

The Association of Chartered Certified Accountants  
The Chartered Institute of Management Accountants  
CFA Institute  
The South African Institute of Chartered Accountants  
The Association of Corporate Treasurers  
The Institute of Internal Auditors  
University of South Africa (CTA)





*Grooming financially  
qualified business leaders*

## CORPORATE OFFICES

CHARTERQUEST HOUSE, Metropolitan park,  
374 Rivonia Boulevard, Rivonia -SANDTON, SOUTH AFRICA  
Tel: +27 (0) 11 234 9223 38 or 086 113 1137