

Investment Foundations[®] Certificate



Format

Self-paced online

Length to complete

60-90 hours

Price

USD350 for the six courses and assessment

Recognition format

- Digital badge
- Certificate for passing the assessment

Participant profile

This series of courses is designed for those aspiring to, or currently working within, support roles across the investment and finance industries. It will benefit those in roles such as marketing, sales, project management, human resources, IT, and legal through better understanding of the industry, facilitating communication with colleagues, and advancing in one's career.

The goal of the Investment Foundations[®] Certificate is to provide an overview of the essentials of finance, ethics, and investment roles, providing a clear understanding of the global investment industry including terminology and foundational concepts. Individual learners develop competence by understanding industry functions, relationships, and their role and professional responsibilities, helping them see where they fit in the big picture. Successfully completing all 6 courses makes one eligible to sit for the final assessment which, when passed, confers an Investment Foundations Certificate and digital badge.

Learning outcomes

- Confidently and skillfully communicate and collaborate with investment management practitioners
- Develop critical thinking skills, ask the right questions, and innovate in optimizing financial outcomes for clients
- On-ramp to the investment profession as a CFA Institute Investment Foundations Certificate holder
- Learn ethical reasoning, understand job roles and responsibilities, and grasp the concepts, tools, and techniques used in the industry

Session topics

Course 1	Industry Overview and Structure
Course 2	Types and Functioning of Markets
Course 3	Investment Instruments
Course 4	Investment Inputs and Tools
Course 5	Serving Client Needs
Course 6	Serving the Greater Good