

A CLEAR UNDERSTANDING OF THE INDUSTRY

The CFA Institute Investment Foundations® Program has evolved to become an online learning experience offering universal accessibility and inclusivity, helping to further our commitment to build market integrity. The program gives those working with investment decision makers a clear understanding of the investment industry, roles and responsibilities, and the vital importance of ethical conduct.

BENEFITS TO FIRMS

ENTERPRISE RISK MANAGEMENT

Employees have a strong understanding of the complexity of the investment management industry, the importance of compliance, and the confidence to speak up when issues arise.

EMPLOYEE ENGAGEMENT

Employees gain a better sense of their role in the firm and how they belong, improving their engagement and making them more effective.

CLARITY

Certificants have a common understanding of industry structure and terminology, regardless of job function or geographic location.

PROGRAM BENEFITS

COLLABORATION

Work more effectively with global colleagues by understanding industry functions, building stronger relationships and raising your professional competence.

CONFIDENCE

Gain the knowledge to identify issues and the confidence to speak up. Get a better sense of your role and how you connect with the complex industry at large.

93% of certificate holders gained a clearer understanding of the investment management industry

WHAT?

The Investment Foundations Program is a free, comprehensive global education program that is completed online.

WHO?

The program is designed for all professional disciplines outside of investment roles, including IT, operations, accounting, administration, and marketing.

HOW?

There is no education or experience requirement. Upon registering for the program, you must meet the following in order to unlock the final exam:

- Wait 30 days from the time of registration
- Achieve 70% or better on Mock Exam A
- Achieve 70% or better on Mock Exam B

87% of certificate holders would highly recommend the program to a friend or colleague

CURRICULUM

The program covers the essentials of the investment management industry:



MODULE 1:
Industry Overview



MODULE 2:
Ethics and Regulation



MODULE 3:
Input and Tools



MODULE 4:
Investment Instruments



MODULE 5:
Industry Structure



MODULE 6:
Serving Client Needs



MODULE 7:
Industry Controls

Find out more:
[cfa.is/InvFound](https://www.cfainstitute.org/en/education/investment-foundations)

