

MEMBER VALUE: THE CONTINUING EDUCATION (CE) PROGRAM

As an investment professional, you know that staying current with industry standards and trends helps to maintain the integrity of your CFA[®] charter, gives you a career edge, and better serves the needs of your clients and firm. The CFA Institute Continuing Education (CE) Program offers a range of activities to meet your unique professional development needs.

SETTING A HIGHER STANDARD

The voluntary CE Program enables you to earn credit for participating in professional development activities that increase your industry knowledge, skills, and abilities as an investment professional.

We encourage all members to participate and to complete at least **20 hours** of CE activities each year, including **2 hours in the content areas of Standards, Ethics, and Regulations (SER)**. In general, **1 CE credit = 1 hour of educational activity**, and credit may be earned in half-hour increments.

CE activities include self-study (e.g., reading relevant books or articles, watching videos or webinars, taking self-paced online courses); employer-based training; and educational programs sponsored by CFA Institute, member societies, third-party approved providers, and other organizations, including investment-related designations.

You can identify CE activities, record credits, and monitor your progress using the online tracking resource on the CFA Institute website; **"1-click" credit entry** is available for qualifying CFA Institute educational activities (articles, videos, online courses). To make managing CE activities as easy as possible, many activities are tracked automatically on your behalf.

70% of CFA Institute members attested to completing voluntary CE in 2014.

More than 28,000 members earned more than 40,000 CE credits through society activities in FY 2015.

CONTINUING EDUCATION OPPORTUNITIES: WWW.CFAINSTITUTE.ORG/LEARNING

CONFERENCES AND EVENTS

CFA Institute partners with local societies, universities, and the investment industry to offer a wide range of insightful and engaging events all over the world. CFA Institute members receive substantial discounts on registration fees for many of our events, and members who complete recommended CE credit hours also receive additional registration discounts.

Member societies and **Approved-Provider Program members** also offer a variety of CE-eligible events across all subject areas. For these events, CE credit is entered on behalf of individual members in their online tracking tool.

ONLINE LEARNING

CFA Institute produces high-quality, **self-paced online learning** on a variety of subjects. These products are designed to help members develop and refine skills or to provide structured learning around other existing content resources. Members can access and print **certificates of completion** for online courses in our new learning management system.

PUBLICATIONS, MULTIMEDIA, AND BLOGS

CFA Institute offers a wealth of "self-study" content that provides practical and applicable information relevant to investment practitioners, cutting edge research, and insightful commentary on the investment industry, much of which is eligible for CE credit.

- *Financial Analysts Journal*[®]: Advancing the practice of investment management through high-quality, practitioner-relevant research.
- CFA Institute Research Foundation: Sponsor of independent and innovative research and comprehensive literature reviews.
- Industry Guides: Practical references for effective company analysis.
- Archived videos and edited proceedings of our best conference speakers and content.
- Live broadcasts and webinars on wide-ranging topics.
- Take 15 series: Short interviews with leading academics, economists, and practitioners across the industry.
- *Enterprising Investor* blog: Practical analysis for investment professionals.

"It's important for a charterholder to maintain a certain level of education so that they can be a better investor."

– Loren Busby, CFA

RECOGNIZING MILESTONE MEMBERS

Each year, **CFA Institute recognizes members who actively participate in the CE Program**, including those who achieve milestones in years of consecutive participation (5, 10, 15, 20, and 25). Learn more about the benefits on the CFA Institute website.

PROFESSIONAL DEVELOPMENT

At CFA Institute, we recognize that continuing education involves much more than just understanding key portfolio management techniques. Our members also need to be leaders, to manage firms, and to communicate effectively with clients.

Our Career Resources Library highlights current content related to job searches and career management and non-technical professional skills, such as communication, presentation, and leadership skills.

CONTACT US

If you have any questions about specific continuing education content or related resources, contact ceprogram@cfainstitute.org.