



THE CIPM DESIGNATION

Though there is a percentage of comparable content in both client engagement and portfolio construction with the CFA Program curriculum, the CIPM Program focuses predominantly on Portfolio Performance Evaluation ensuring that candidates gain the skills to drive smarter, more effective investment decisions and maximize investors' value.

Trust, transparency, and analytical expertise are essential if today's markets are to function at their best. As a result, professionals who can demonstrate mastery of the balance of skills needed for evaluating performance and risk, finding actionable insights from investment decisions, and communicating performance effectively are in high demand.

WHAT IS CIPM?

The only credential of its kind, the CIPM program leverages the global expertise of CFA Institute, the respected global leader in investment education and ethics, to deliver practice-based approaches and skills for effective investment performance and risk evaluation, manager selection, and investment reports steeped in accountability.

The CIPM program has two levels:

CIPM Level I (formerly Principles Level)

CIPM Level II (formerly Expert Level)

All CFA charterholders and candidates who have successfully completed the CFA Level III exam can **bypass CIPM Level I and proceed directly to Level II.**

WHO IS IT FOR?

- Investment performance analysts
- Investment consultants
- Portfolio managers
- Risk analysts/managers
- Manager of managers
- Portfolio accountants
- Compliance officers
- Financial advisors/planners



HOW CAN IT HELP YOU?

Increase your practical expertise to stay competitive

- Learn to spot actionable analytical information.
- Understand how to thoroughly evaluate investment managers.
- Keep pace with the latest performance evaluation skills.
- Gain applicable knowledge and skills demanded by the industry.

Earn recognition for influencing decisions

- Position yourself as an expert to deliver actionable insights that shape decision making.
- Better articulate and communicate performance information.
- Build credibility and trust with clear and complete reporting skills.
- Leverage the recognition and respect for CIPM across the industry.

Gain a reputation for accountability

- Demonstrate a commitment to professional ethics and transparency.
- Build trust by using globally comparable and consistent metrics.
- Better meet fiduciary responsibilities with improved risk practices.

Improve performance to build your business

- Increase efficiency and translate insights into action.
- Select fund managers with superior performance traits.
- Exceed client expectations with more transparent communications.
- With a trusted reputation and demonstrable results, attract new and retain existing clients.

INTERESTED?

Become part of the CFA Institute **global community** of investment professionals who strive for **integrity and excellence.**

Learn more and register at www.cfainstitute.org/programs/cipm.