

A CLEAR UNDERSTANDING OF THE INDUSTRY

IS THE CFA INSTITUTE INVESTMENT FOUNDATIONS™ PROGRAM RIGHT FOR YOU?








The Investment Foundations Program is a certificate program designed to give you a clear understanding of the investment management industry. Whether you're just starting a career in financial services or want to learn essential industry concepts, the Investment Foundations Program offers an accessible solution for breaking through the complexities of the global investment industry and raising your professional profile.

THE BIG PICTURE

The Investment Foundations Program is a comprehensive global education program that provides a clear understanding of investment industry essentials. The program is designed for all professional disciplines outside of investment roles, including IT, operations, accounting, administration, and marketing. There is no education or experience requirement and the exam can be taken at your convenience at available test centers around the world.

WHAT YOU LEARN

The program covers the essentials of the investment management industry:

-  **Module 1:**
Industry Overview
-  **Module 2:**
Ethics and Regulation
-  **Module 3:**
Inputs and Tools
-  **Module 4:**
Investment Instruments
-  **Module 5:**
Industry Structure
-  **Module 6:**
Serving Client Needs
-  **Module 7:**
Industry Controls

HOW WILL YOU BENEFIT



Clarity

Benefit from having a common understanding of industry structure and terminology, regardless of your job function or geographic location.



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 global industry at large.

"The CFA Institute Investment Foundations Program is very relevant to the current market and I can study on the move. The program cleared up a lot of concepts for me and now I am much more comfortable speaking with clients about what is happening in the market."

MITALI BHANDARE
MORNINGSTAR, INVESTMENT
FOUNDATIONS CERTIFICATE HOLDER

"The main benefit of the CFA Institute Investment Foundations Program was an ability to see a bigger picture of the finance industry and the role of our business within it."

ALEXANDER TARASOV
CITCO FUND SERVICES, INVESTMENT
FOUNDATIONS CERTIFICATE HOLDER

HOW TO FIND OUT MORE

Go to: cfa.is/InvFound