

Claritas®

Investment Certificate



Congratulations on earning the Claritas® Investment Certificate! Your achievement demonstrates a commitment to professional development and lifelong learning. More importantly, it welcomes you into a global CFA Institute community of finance professionals who are working to build a more ethical industry where clients' interests come first and societies thrive. The future of finance rests with each of us, and I'm hopeful that you will be an active steward of the values and principles you learned in the Claritas Program.

CFA Institute would like to support you in growing your professional expertise, and this Claritas newsletter serves as a vehicle to provide you content that is relevant to your growth. We will cover a wide variety of financial industry topics, some of which you will recognize from the Claritas course of study. We look forward to emailing you each quarter.

Best regards,

A handwritten signature in black ink, appearing to read "John Rogers". The signature is fluid and cursive, written on a light-colored background.

John Rogers, CFA
President and CEO
CFA Institute

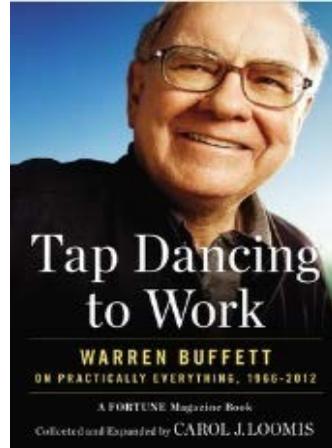
FEATURES:

[Top 20 Films about Finance: From Crisis to Con Men](#)

Over the past few months, I have watched countless films about finance, from movies to documentaries to television programs. My aim: to identify the top 20 films on the basis of both their entertainment value and their educational value.

[Book Review: Tap Dancing to Work: Warren Buffett on Practically Everything, 1966–2012](#)

This enjoyable collection of articles about and by Warren Buffett gives readers the opportunity to learn about his business achievements. Even seasoned readers who have tracked Buffett's career for decades are likely to find enough new material to pique their interest.



RELATED LINKS:

[Fund Management: An Emotional Finance Perspective \(a summary\)](#)

Emotions play an important role in investment decision-making according to UK-based professors Taffler and Tuckett. The authors find that excitement, anxiety and denial have a bigger impact on investment decisions than does fear, hope and greed. What do you think? Find out more by reading the emotional finance summary.

[Trust and Human Relationships: The Core of Client Relationship Management](#)

All business relationships, especially client relationships, must be built on mutual trust. At its most basic, trust is a human instinct. But many factors affect the decision to trust another individual. Trust can also be built over time through communication of shared needs and commitments. Behaviors that justify trust are important, but exhibiting those behaviors to others is equally important.

[The Inefficient Frontier: Work–Life Balance](#)

How can busy professionals manage the competing priorities of a full life?

[How to Deal with Irate Clients \(Take 15 Series\)](#)

The Take 15 Series is a series of short interviews with leading practitioners on timely topics focused on the investment profession. In this episode, Richard L. Peterson provides a medical and emotional description of irate clients and discusses techniques for dealing with them and how advisors should frame solutions.



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