



**Công ty TNHH đào tạo, tư vấn
và đầu tư – AFTC**

**WELCOME TO
“CFA LEVEL I” INFORMATION
SESSION & COURSE ORIENTATION**

CFA- OVERVIEW

🏠 <http://www.cfainstitute.org/>

🏠 Chartered Financial Analysts

🏠 A self-study, graduate-level program for investment professionals.

🏠 A three-year program that requires you to study for and pass three levels of exams.

🏠 If you pass the exams and meet other requirements, you earn a **CFA charter**.

CFA- OVERVIEW

- 🏠 When you sign up for the CFA Program, you become a candidate. As a **candidate**, you:
 - 🏠 Study for three exams using an assigned curriculum
 - 🏠 Take the three levels of the exams sequentially

- 🏠 If you pass all three exams, meet the professional and ethical requirements, and become a regular member of CFA Institute, you become a CFA **charterholder**.

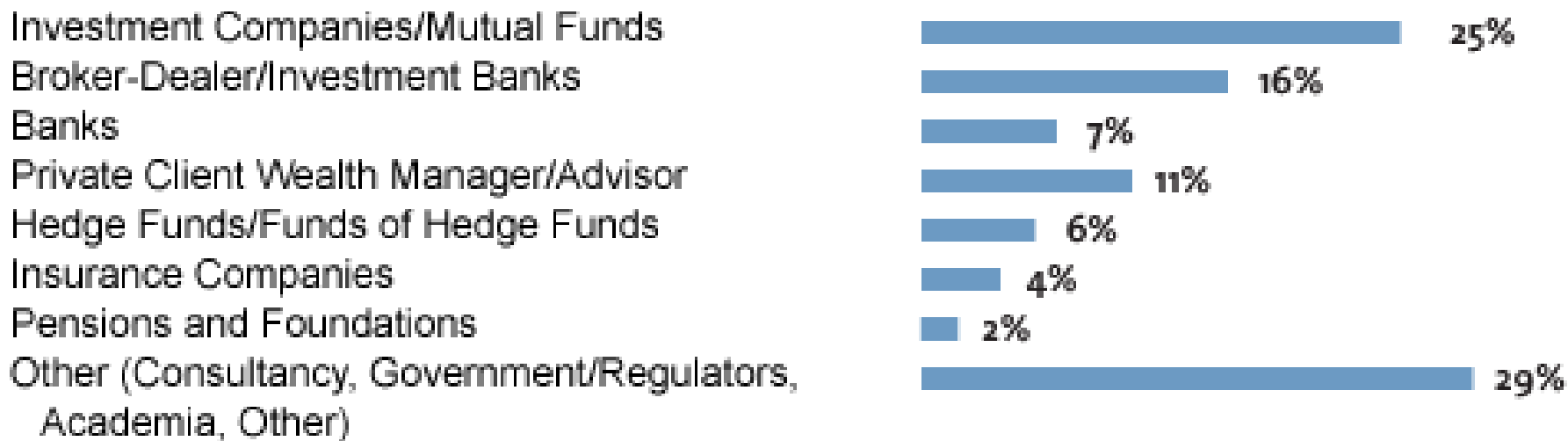
CFA- OVERVIEW

- 🏠 Exams for all levels are held in locations around the world. Level I exams are held in June and December. Levels II and III are only held in June.
- 🏠 You can take as long as you need to complete the program, and there is no limit to the number of times you can take each exam. The curriculum changes each year to meet the dynamic nature and complexity of the global investment profession.

CFA- FOR WHOM?

- 🏠 If you're interested in portfolio management, investment research, advisory services, or investment banking, this may be the right step.

Who Hires CFA Charterholders?



CFA- BENEFITS FOR YOU

🏠 Credibility:

- 🏠 Clients and colleagues regard you with a presumption of expertise

🏠 Competitive advantage:

- 🏠 Employers and clients want the experience that comes with the CFA charter

🏠 Connections:

- 🏠 You'll join a global network of more than 78,000 professionals

🏠 Recognition:

- 🏠 You'll earn a designation praised by employers & media

CFA- BENEFITS TO COMPANIES



- 🏠 A cost-effective and efficient way to increase the knowledge and professionalism of your staff
- 🏠 A global program that tracks the needs of the industry and employers like you
- 🏠 A measure of job applicants' competence and integrity

CFA- HISTORY

- 🏠 **15 June 1963:** 284 senior analysts sit for the first-ever CFA exam
- 🏠 **June 2008:** More than 90,000 candidates from 160 countries sit for one of the three levels of the CFA exam
- 🏠 **June 2010:** 139,900 candidates from 160 countries sit for June 2010 CFA exam.

CFA LEVEL 1- PASS RATE



CFA Candidates			LEVEL I				LEVEL II				LEVEL III			
Years	Total	% Pass	Total	Pass	Fail	% Pass	Total	Pass	Fail	% Pass	Total	Pass	Fail	% Pass
2005A	58,908	48%	22,915	8,138	14,777	36%	24,891	13,938	10,953	56%	11,102	6,083	5,019	55%
2005B	21,127	34%	21,127	7,276	13,851	34%								
2006A	63,249	52%	26,467	10,602	15,865	40%	20,499	9,751	10,748	48%	16,283	12,314	3,969	76%
2006B	28,082	39%	28,082	10,905	17,177	39%								
2007A	71,897	42%	33,599	13,294	20,305	40%	25,521	10,156	15,365	40%	12,777	6,399	6,378	50%
2007B	37,573	39%	37,573	14,831	22,742	39%								
2008A	92,081	42%	44,063	15,311	28,752	35%	33,449	15,243	18,206	46%	14,569	7,720	6,849	53%
2008B	49,797	35%	49,797	17,612	32,185	35%								
2009A	104,111	45%	45,682	21,034	24,648	46%	38,993	15,891	23,102	41%	19,436	9,597	9,839	49%
1963-09A	1,179,315	49%	665,471	295,135	370,336	44%	328,696	160,813	167,883	49%	185,148	117,831	67,317	64%


Note:

A = June Examination (Levels I, II, and III)
 B = December Examination (Level I only)

FAQs

FREQUENTLY ASKED QUESTIONS

What is the CFA Program? I thought it was an exam.

-  The CFA Program is an educational program that tests your mastery of a body of knowledge through a series of exams. If you pass these three exams and meet other requirements, you earn a CFA charter.


What is a CFA charter?

-  The CFA charter is the designation you earn when you successfully complete the CFA Program. When you earn a charter, you become a CFA charterholder.


What is a candidate?

-  A candidate is a person enrolled in the CFA Program.

How many exams will I have to take?

-  There are three levels of exams. You have to pass one exam to move on to the next one. If you fail a level, you can retake the exam. There is no limit to the number of times you can take an exam.

Do I have to take the exams in three years?

-  No. You do not have to complete the CFA Program within a specified time frame, and there is no limit to the number of times you can take an exam. You do not need to repeat an exam level that you already have passed, regardless of the time that elapses between exams.


When are the exams held?

-  Exams are held in June (all levels) and December (Level I only).


Where are the exams held?

-  Exams are held in locations around the world in June (all levels) and December (Level I only).


If I pass the Level I exam in December, can I register for the Level II exam held the following June?

-  Yes. But remember that your preparation time will be shorter. It's important to consider your personal and professional demands before registering for an exam.

What is the format for the exams?

-  Each exam includes morning and afternoon sessions. The Level I questions are all multiple choice. The Level II questions are all item set (or “mini case”) questions. The Level III exams contain essay questions in the morning session and item set questions in the afternoon session.

Why doesn't CFA Institute offer the exam in languages other than English?

-  In order to ensure fair, global consistency both in administering the exam questions and grading candidate responses, we offer the exams only in one language.

🏠 To become a candidate:

1. Fulfill the entrance requirements. You must:

- 🏠 Have a U.S. bachelor's (or equivalent) degree
Or be in the final year of your bachelor's degree program at the time of registration
(**Note:** proof of degree is required for progression to Level II)
- 🏠 Meet the professional conduct admission criteria (during the application process, you will be asked to sign statements of Professional Conduct and Candidate Responsibility).
- 🏠 Be prepared to take the exams in English.

2. Sign up for your first exam.

Registering for the first exam also enrolls you as a candidate in the CFA Program. This requires a one-time program enrollment fee in addition to the exam registration fee.

FAQs- COSTS



June 2011 CFA Exam Registration Opening Mid- to Late-July
 All fees are in U.S. dollars.*

Payment deadlines	New Level I CFA Program enrollment	CFA exam registration	Curriculum options [‡] (details below)	Total cost
22 September	\$405	+ \$630	+ eBook only	\$995
			+ print only	\$1,055
			+ eBook and print	\$1,085
16 February	\$405	+ \$720	+ eBook only	\$1,085
			+ print only	\$1,145
			+ eBook and print	\$1,175
16 March	\$490	+ \$970	+ eBook only	\$1,420
			+ print only	\$1,480
			+ eBook and print	\$1,510

2011 curriculum pricing details

2011 curriculum **eBook** (online) version: subtract \$40 from exam registration

2011 curriculum **printed** version: add \$20 shipping costs to exam registration

2011 curriculum **eBook and printed versions (bundle)**: add \$50 to exam registration fee (includes \$20 shipping fee)

I live outside the United States. Will I have to pay any additional import fees when the CFA Program curriculum is shipped to me?

Maybe. If your local regulations require you to pay an import fee, you will be contacted by the shipping company (UPS) with additional information

Topic areas (also read appendix 1)

Topic Area	Level I	Level II	Level III
Ethical and Professional Standards	15	10	10
Quantitative Methods	12	5-10	0
Economics	10	5-10	0
Financial Reporting and Analysis	20	15-25	0
Corporate Finance	8	5-15	0
Equity Investments	10	20-30	5-15
Fixed Income	12	5-15	10-20
Derivatives	5	5-15	5-15
Alternative Investments	3	3-15	5-15
Portfolio Management	5	5-15	45-55
Total	100	100	100

Result announcement

Q#	Topic	Max Pts	<=50%	51%-70%	>70%
-	Alternative Investments	8	*	-	-
-	Corporate Finance	20	-	-	*
-	Derivatives	12	-	-	*
-	Economics	24	-	-	*
-	Equity Investments	24	-	-	*
-	Ethical & Professional Standards	36	-	-	*
-	Financial Statement Analysis	48	-	-	*
-	Fixed Income Investments	28	-	-	*
-	Portfolio Management	12	-	-	*
-	Quantitative Methods	28	-	-	*

🏠 How do I prepare for the exams?

- 🏠 CFAI recommends that you spend at least 250 hours preparing for each exam level.
- 🏠 Studying tools:
 - 🏠 Readings
 - 🏠 Learning outcome statements
 - 🏠 Problem sets (to demonstrate practical application of your knowledge)
 - 🏠 Sample questions
 - 🏠 Study groups
 - 🏠 Online sample and mock exams



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**AFTC COURSE INTRODUCTION &
ORIENTATION**

Training:

-  Finance, Accounting, Tax, Sales

Consultancy:

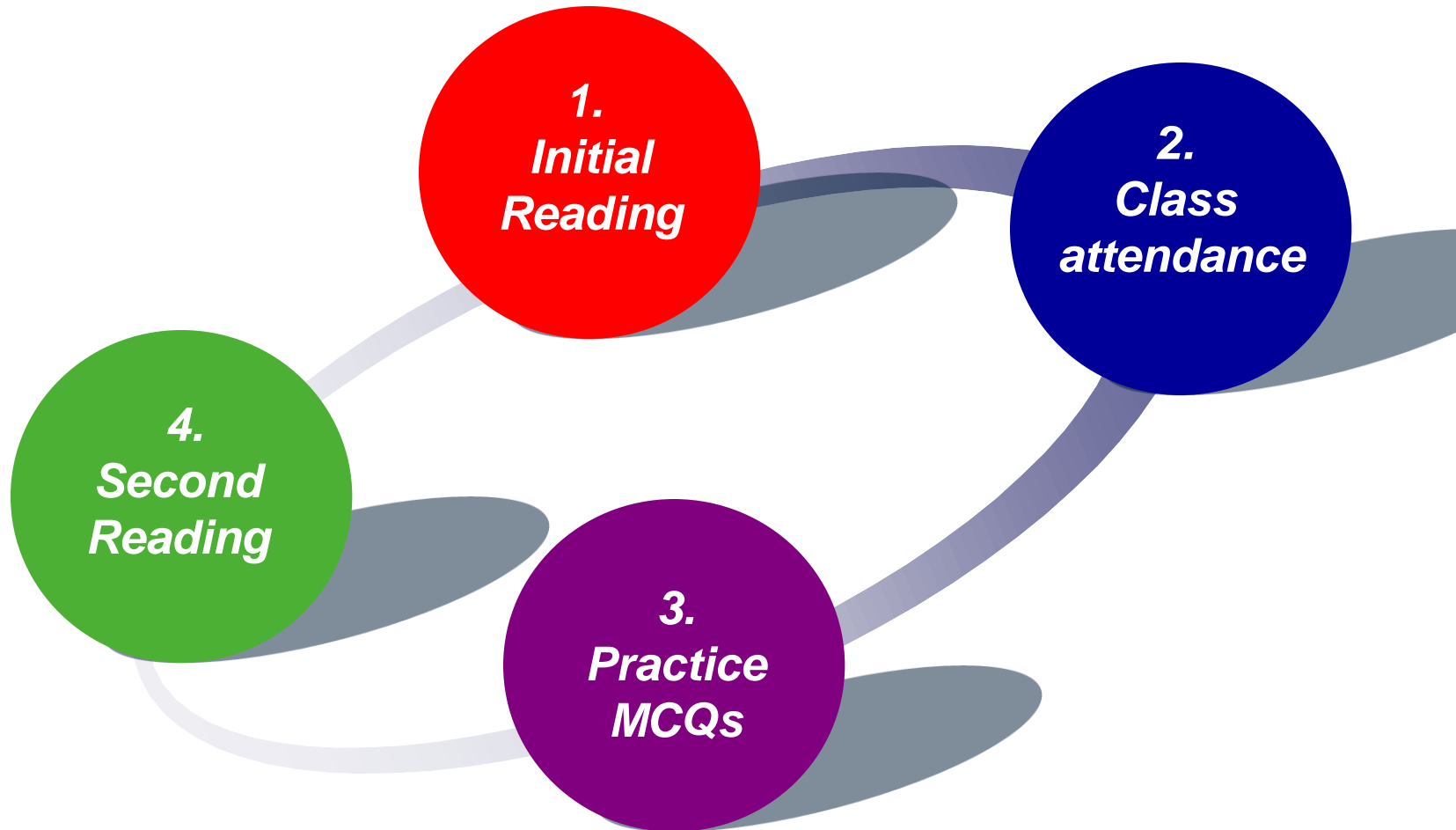
-  Accounting, Tax, Corporate Finance, Business plan, Distribution network

Investment

Purposes of the CFA level 1 course

- 🏠 Provides methodologies to study the CFA curriculum effectively
- 🏠 Helps understand the CFA syllabus
- 🏠 Facilitates self-studying process (venues and equipments, study in groups, instructors' feedback and requirements)
- 🏠 Suggests exam skills

➤ Studying process:



- Cover all LOS (Learning Outcome Statements)
- Mindjet MindManager

CFA level 1,2,3 courses at AFTC



- 🏠 Please refer to Appendix 2 (unique features & lecturers)
- 🏠 Schedule (please get a copy of tentative schedule)
- 🏠 Pictures
- 🏠 Fee

Study materials and tools

🏠 Schweser notes

🏠 Financial calculator: Texas Instruments

(HN: Cửa hàng pin Tuấn Dung, 61 Hàng Đào

TP. HCM: Cty TNHH Tràng An, 1165 Trần Hưng Đạo, P5, Q5)

🏠 Concept maps (downloadable from the web)

🏠 Pens, pencils, Eraser

🏠 Computer with MindJet MindManager

🏠 Email

CLASS RULES

 Punctuation

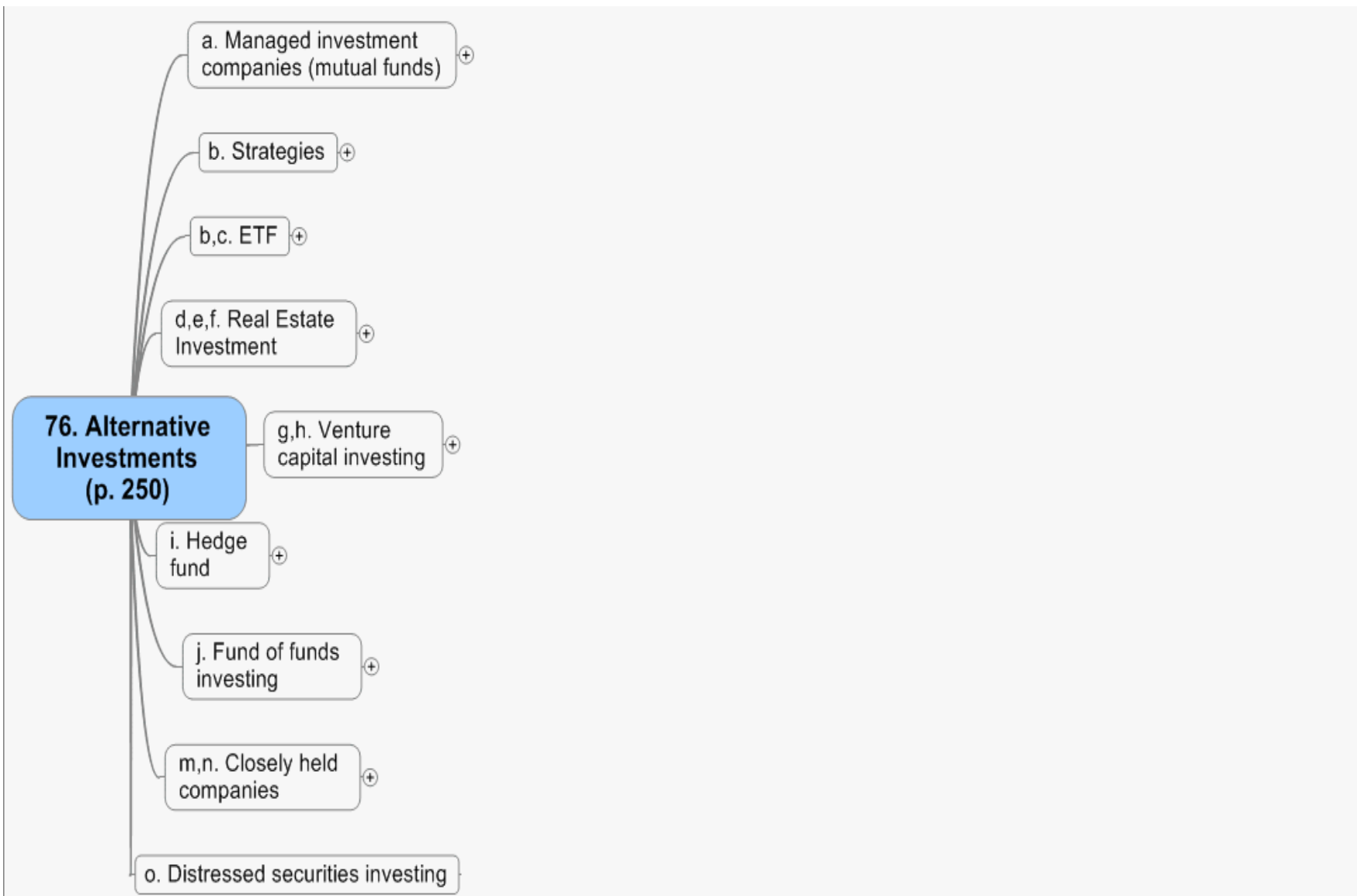
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Bản đồ tư duy

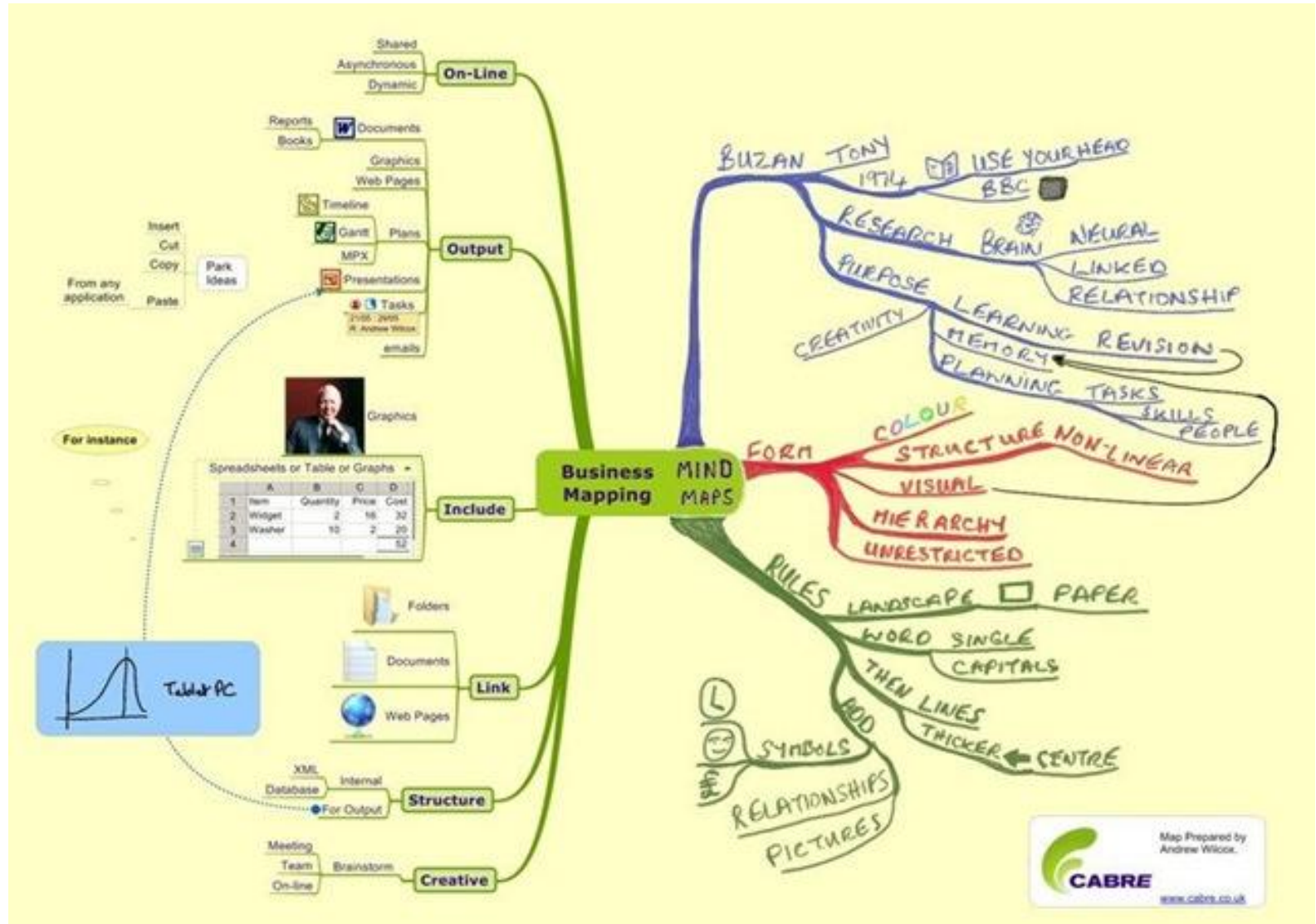
Mind maps

Concept Maps / Mind maps



🏠 Bản đồ tư duy là gì?

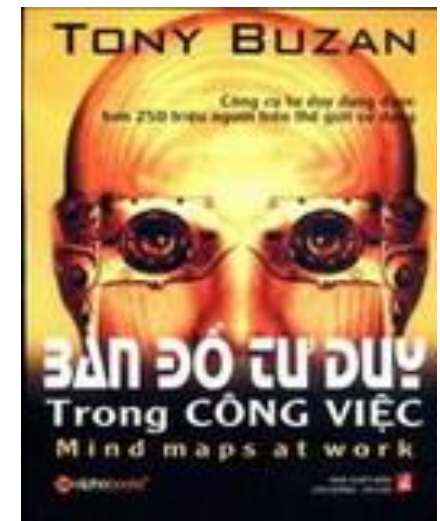
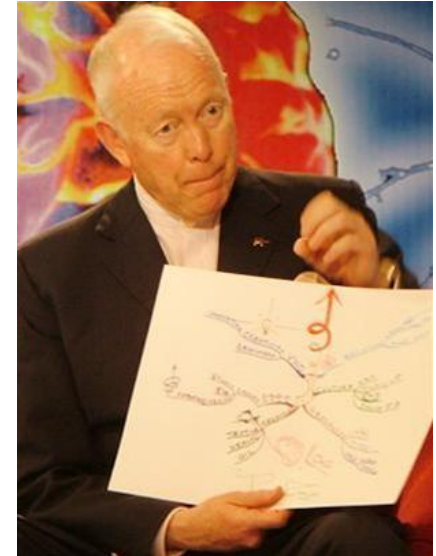
- 🏠 Bản đồ tư duy là một công cụ tổ chức tư duy.
- 🏠 Đây là phương pháp dễ nhất để chuyển tải thông tin vào bộ não của bạn rồi đưa thông tin ra ngoài bộ não.
- 🏠 Nó là một phương tiện ghi chép đầy sáng tạo và rất hiệu quả. Theo đúng nghĩa của nó, “Sắp xếp” ý nghĩ của bạn.



🏠 Về tác giả Tony Buzan

Tony Buzan là người sáng tạo ra phương pháp tư duy Mind Map (bản đồ tư duy). Tony Buzan từng nhận bằng Danh dự về tâm lý học, văn chương Anh, toán học và nhiều môn khoa học tự nhiên của trường ĐH British Columbia năm 1964. Tony Buzan là tác giả hàng đầu thế giới về não bộ.

- 🏠 Ông đã viết 92 đầu sách và được dịch ra trên 30 thứ tiếng, với hơn 3 triệu bản, tại 125 quốc gia trên thế giới. Tony Buzan được biết đến nhiều nhất qua cuốn “Use your head”. Trong đó, ông trình bày cách thức ghi nhớ tự nhiên của não bộ cùng với các phương pháp Mind Map. Ngoài ra, ông còn có một số sách nổi tiếng khác như Use your memory, Mind Map Book



- 🏠 Để Lập Bản Đồ Tư Duy không khó, Chỉ cần một tờ giấy trắng, bút bi, bút chì hoặc bút sáp màu, nhắm mắt lại, sử dụng bộ não, trí tưởng tượng và liên kết cùng với sự kết hợp giữa từ ngữ, hình ảnh, đường nét, màu sắc... sẽ giúp bạn khai phá tiềm năng vô tận của bộ não.

Bản đồ tư duy giúp gì cho bạn?

🏠 Với cách thể hiện gần như cơ chế hoạt động, cấu trúc và chức năng của bộ não, Bản đồ tư duy sẽ giúp bạn:

- * Giúp bạn giải quyết vấn đề
- * Giúp bạn trở nên Sáng tạo hơn
- * Tiết kiệm thời gian cho bạn
- * Ghi nhớ tốt hơn và lâu hơn
- * Làm sáng tỏ một tính huống
- * Nhìn thấy bức tranh tổng thể, sẽ hướng bạn đến trọng tâm của vấn đề
- * Phát triển các ý tưởng của mình
- * Sắp xếp kế hoạch cho bản thân
- * Giúp bạn tổ chức và quản lý cuộc sống tốt hơn



THANK YOU