

## CFA® Review Course 2nd Series of CFA® Level III - Review Course

24 February 2018 – 9 June 2018

Exam Focus: June 2018

The Chartered Financial Analyst® (CFA®) Program is a graduate-level program that provides a strong foundation of the skills and knowledge needed to succeed in today's competitive world of investing and finance. It combines a broad-based curriculum of investment principles with professional conduct requirements. It is administered by CFA Institute ([www.cfainstitute.org](http://www.cfainstitute.org)), the global not-for-profit organization of investment professionals.

### Global Recognition

With a six-decade history of maintaining a rigorous focus on globally relevant investment knowledge, the CFA® Program is the most widely known and respected investment credential in the world. It is recognized by the global investment community as the highest educational and professional excellence standard.

### Career Advantage

Employers recognize the CFA® charter as the definitive standard of competence, integrity, and dedication of investment professionals. The CFA® Program stands out at every stage of your career and equips you with the practical and fundamental knowledge you need for the investment profession. There is no better way to demonstrate your commitment and your ability to perform at a high level in the investment profession than by enrolling in and completing the CFA® Program.

### Practical Skills

The CFA® Program curriculum focuses on the practical knowledge and current skills necessary in the global investment management profession. These skills can be immediately applied on the job and evolve each year to include new tools, ideas, frontier concepts, and lessons to reflect the dynamic and complex nature of the global investment profession.

### Community

Earning the CFA® charter places you in the company of an elite group of nearly 110,000 respected investment professionals. Access to their collective expertise, networks, and resources is an invaluable asset.

## Hellenic Capital Market Commission & Bank of Greece

The Hellenic Capital Market Commission and the Bank of Greece - regulators of investment services in Greece - recognize that CFA® Charter holders are entitled to the highest certificate of "Securities & Market Analyst" (certificate level "δ"), without having to sit for the examinations whose curriculum is covered by the CFA Program.<sup>1</sup>

### The CFA® Program

The CFA® program requires candidates to study for and pass three levels (I, II & III) of exams and meet other requirements, such as, 4 years of relevant work experience in order to earn a CFA® charter. In general, each level of the CFA® program requires a minimum of 300 hours of personal study, although time will vary based on familiarity with the material. To name a few of those who pursue the CFA® charter: Financial analysts, Securities & Investment managers, Securities & Derivatives traders, Portfolio managers, Financial planners, Relationship officers, Risk managers, Chief Financial Officers of corporations.

### CFA® Program Exam Registration Requirements

You must be prepared to take the exams in English and understand the professional conduct requirements. *You must have a valid international travel passport required for enrollment and exam registration. On exam day, passport number, expiration date, and personal details on your passport must match the information you provided to CFA Institute upon registration.*

### CFA Society Greece & Hellenic Banking Institute CFA® Review Course

The CFA Society Greece, in partnership with the Hellenic Banking Institute of the Hellenic Bank Association, offers a CFA® Review Course for level III of the CFA® Study and Examination Program. This Review Course provides candidates with a structured, classroom-based approach to preparing for the exam. It is designed to assist candidates in mastering the Candidate Body of Knowledge™ (CBOK™) that is attached.

### Structured Classroom-based Instruction

Weekly classes provide structure for a disciplined pace of preparation. The focus is on the comprehension of the assigned materials in the Study Guides with an emphasis on the Learning Outcome Statements (LOS). Total class duration amounts to approximately 32 hours, as following:

| Class Day | February 2018 | March 2018    | May 2018 | June 2018 |
|-----------|---------------|---------------|----------|-----------|
| Saturday* | 24            | 3, 10, 17, 24 | 5        | 2, 9      |

\* Saturday classes start at 09:00 a.m. and last for 6 hours in approximation.

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<sup>1</sup> CFA charter holders are exempted from all modules except from the "Capital market regulatory framework".

## Supplementary Study Materials Included

As an extra bonus at no additional charge, the *Schweser Essential™ Prep Package* (Retail Price: \$649) is provided to all candidates (available for pick-up as soon as shipment arrives), including:

- Schweser (Study) Notes™
- Schweser's QuickSheet™
- SchweserPro™ QBank (Online)
- Practice Exams, Vol. 1 & Vol. 2
- InstructorLink™ (partial access)
- Searchable FAQs & Exam-tips Blog
- Online Practice Exams

## Practice Tests & Mock Exams

Two interim practice tests and two final mock exams, which are provided by Schweser, Kaplan and the Boston Society of Security Analysts, will assist candidates in assessing their strengths and weaknesses. These will be held in the context of the continuous monitoring of the candidates' progress throughout the course that will be evaluated on the basis of attendance to classes as well as practice and mock exam scores.

## Top-notch Instructors

All sessions will be taught by multiple instructors who have been selected for their subject-matter expertise and excellence. All of them are holders of the CFA® charter and have a long track of professional and / or academic experience in the topics that they teach:

| SS   | Topic  | Name                       | Company/Institution     | Position                         |
|------|--|----------------------------|-------------------------|----------------------------------|
| SS3  | Behavioral Finance   | Lila Mordochae, CFA        |                         | Professor of Finance             |
| SS4  | Private Wealth Management (1)                                      | Lila Mordochae, CFA        |                         | Professor of Finance             |
| SS5  | Private Wealth Management (2)                                      | Lila Mordochae, CFA        |                         | Professor of Finance             |
| SS6  | Portfolio Management for Institutional Investors                   | Lila Mordochae, CFA        |                         | Professor of Finance             |
| SS7  | Applications of Economic Analysis to Portfolio Management          | Tassos Vassiliou, CFA      | National Bank of Greece | Investment Strategist            |
| SS8  | Asset Allocation and Related Decisions in Portfolio Management (1) | Tassos Vassiliou, CFA      | National Bank of Greece | Investment Strategist            |
| SS9  | Asset Allocation and Related Decisions in Portfolio Management (2) | Tassos Vassiliou, CFA      | National Bank of Greece | Investment Strategist            |
| SS10 | Fixed Income Portfolio Management (1)                              | Antonios Mintzas, CFA      | NN Hellas               | Investment Manager               |
| SS11 | Fixed Income Portfolio Management (2)                              | Antonios Mintzas, CFA      | NN Hellas               | Investment Manager               |
| SS12 | Equity Portfolio Management  | Stamatis Draziotis, CFA    | Eurobank Equities       | Equity Analyst                   |
| SS13 | Alternative Investments for Portfolio Management                   | Vicky Delieza, CFA         |                         | Investment Professional          |
| SS14 | Risk Management  | Vassilis Eftymiou, CFA     | Eurolife ERB            | Investment Manager               |
| SS15 | Risk Management Applications of Derivatives                        | Stavros Daliakopoulos, CFA | Eurobank Ergasias       | Head of FX & Derivatives Trading |
| SS16 | Trading, Monitoring, and Rebalancing                               | Stavros Daliakopoulos, CFA | Eurobank Ergasias       | Head of FX & Derivatives Trading |
| SS17 | Performance Evaluation   | Vicky Delieza, CFA         |                         | Investment Professional          |
| SS18 | Global Investment Performance Standards                            | Vicky Delieza, CFA         |                         | Investment Professional          |

## Location & Administration

All classes will be held at the premises of the Hellenic Banking Institute: Massalias 1, Athens. For registrations and any information requests please refer to the following contact details:

- **Hellenic Banking Institute**  
**Mrs. M. Papoutsi tel. 210 33.86.429, email: mpapoutsi@hba.gr**

**CFA Society Greece**  
**email: training@cfa.gr**

## Registration Student Pack

Upon registration to the Review Course, all candidates will receive the following:

- i) A detailed timetable of the classes referring to the dates, hours and instructors per topic.
- iii) An outline of the suggested readings and practice questions from the books.

## Review Course Fees

Course Fees: **950 €**

Level III candidates who have attended Level II Review Course, organized by the CFA Society Greece and Hellenic Bank Association, in the past are eligible for a 10% discount. Further, an "Early booking" discount (10%) applies if registration and first payment take place at least 2 weeks before the beginning of the classes. The CFA® Review Course can be submitted to the relevant OAED program<sup>2</sup>, LAEK 0,24%. For detailed information about our discount policies please contact us.

Registration for the CFA® Review Course does NOT constitute enrollment in the CFA® Exam.

## Refunds & Cancellation

If enrollment is canceled in writing within two weeks after the program start date, any fees paid upon registration will be refunded except from the cost of any course materials the participant has received (included in the fees). No refunds will be issued after two weeks from the start date of the program.

## Rules – Disclaimers

The Review Course does not in any way aim to replace the intensive personal study that is required by the candidates, but works as supplementary towards their adequate preparation for the exam. Any study material that will be distributed is used to facilitate the learning process and does not constitute a substitute of the CFA® Program reading assignments provided by CFA Institute that comprise the core of study.

Registration in the CFA® Review Course is non-transferable. The Hellenic CFA Society and the Hellenic Banks Association retain the right to cancel the implementation of the Review Course provided that the number of registrations is not deemed sufficient as well as to modify the class timetable, if needed. Candidates are expected to adhere to the CFA Institute Code of Ethics, Standards of Professional Conduct, and Rules of Procedure for Proceedings Related to Professional Conduct and other conditions, requirements, procedures and policies set forth by the CFA Institute.

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**Αριθμός συμμετεχόντων:** Μέχρι 25, κατά χρονική προτεραιότητα δηλώσεων συμμετοχής.

**Τόπος διεξαγωγής:** Ελληνικό Τραπεζικό Ινστιτούτο, Μασσαλίας 1, Αθήνα.

Για **δηλώσεις συμμετοχής**, συμπληρωματικές πληροφορίες, **υποβολή προγράμματος στον ΟΑΕΔ** παρακαλούμε τηλεφωνήστε στο 210 33.86.411 (κα Παπουτσή).

ΣΕΜΙΝΑΡΙΟ

<sup>2</sup> For more information, you can visit the website: <http://www.oaed.gr/>

## 2nd Series of CFA® Level-III Review Course

Exam Focus: June 2018

### LIST OF TOPICS

**Behavioral Finance, Individual Investors, and Institutional Investors**

**Capital Market Expectations**

**Asset Allocation**

**Fixed Income and Equity Portfolio Management**

**Alternative Investments, Risk Management, and the Application of Derivatives**

**Portfolio: Execution, Evaluation and Attribution, and Global Investment Performance Standards**

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## 2nd Series of CFA® Level III - Review Course

Η εκπαιδευτική διαδικασία συνιστά σχέση αμφίδρομης ουσιαστικής επικοινωνίας εκπαιδευτών και συμμετεχόντων. Η αποτελεσματικότητα της επικοινωνίας αυτής καθορίζεται σε μεγάλο βαθμό από το σχετικό με το σεμινάριο υπόβαθρο, τις ανάγκες και τις προσδοκίες των συμμετεχόντων.

Συγκεκριμένα, χαρακτηριστικά όπως η εργασιακή εμπειρία, το εκπαιδευτικό υπόβαθρο των συμμετεχόντων και τα ειδικότερα οφέλη που προσδοκούν αυτοί να αποκομίσουν από το εκπαιδευτικό πρόγραμμα συνιστούν καθοριστικούς παράγοντες, που πρέπει να συνεκτιμώνται για την αποτελεσματική προσαρμογή της μεθοδολογίας που θα χρησιμοποιήσουν οι εισηγητές.

Τα παρακάτω στοιχεία είναι απολύτως εμπιστευτικά και θα χρησιμοποιηθούν μόνο από το ΕΤΙ. Οι πληροφορίες αυτές θα βοηθήσουν τους εισηγητές να διαμορφώσουν το κατάλληλο εκπαιδευτικό «μείγμα» που θα μεγιστοποιήσει το δικό σας όφελος.

| <b>ΠΡΟΦΙΛ ΕΚΠΑΙΔΕΥΟΜΕΝΟΥ</b>   |                          |
|--|--------------------------|
| <b>Όνοματεπώνυμο:</b>  | <b>Τράπεζα/εταιρεία:</b> |
|  | <b>Μονάδα:</b>           |
| <b>Σημερινά επαγγελματικά καθήκοντα</b> (σύντομη περιγραφή):   |                          |
| <b>Χρόνια προϋπηρεσίας:</b> ..... <b>Προηγούμενες θέσεις εργασίας</b> (εντός ή εκτός τραπεζικού χώρου):                          |                          |
| <b>Σπουδές – ειδικότητες:</b>  |                          |
| <b>Θέματα σχετικά με το πρόγραμμα που γνωρίζετε με οποιονδήποτε τρόπο</b> (π.χ. εμπειρία, εκπαίδευση, αναγνωστικά ενδιαφέροντα): |                          |
| <b>Εκπαιδευτικά προγράμματα που έχετε παρακολουθήσει για το ίδιο ή παρεμφερές θέμα:</b>  |                          |
| <b>Θεματικές ενότητες στις οποίες θα επιθυμούσατε να δώσει μεγαλύτερη έμφαση ο εισηγητής:</b>                                    |                          |

**Πώς μάθατε για το πρόγραμμα προετοιμασίας CFA Society Greece – ETI**

- Site EET – ETI ( [www.hba.gr/eti](http://www.hba.gr/eti) )
- Site CFA Society Greece ( [www.cfasociety.gr](http://www.cfasociety.gr) )
- Linked-in Group: [Greek CFA candidates](#)
- Από αναζήτηση στο διαδίκτυο (Search Engine)
- Από σύσταση γνωστού ή φίλου
- Από τον εργοδότη μου
- Από άλλη πηγή (παρακαλούμε προσδιορίστε): \_\_\_\_\_

**Για την καλύτερη προετοιμασία της εκπαίδευσης, παρακαλούμε συμπληρώστε τις παρακάτω πληροφορίες:**

1. E-mail εργασίας: \_\_\_\_\_  
E-mail προσωπικό: \_\_\_\_\_

2. Είναι η πρώτη φορά που συμμετέχετε στις εξετάσεις CFA – Level II;  
 Ναι  Όχι (παρακαλούμε προσδιορίστε) \_\_\_\_\_

3. Αναφέρετε τους τίτλους σπουδών τριτοβάθμιας εκπαίδευσης που διαθέτετε:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Παρακαλούμε στείλτε το συμπληρωμένο ερωτηματολόγιο μέχρι τις 15/2/2018 στο e-mail: [mpapoutsis@hba.gr](mailto:mpapoutsis@hba.gr) ή στο fax: 210-3646122.**

Ευχαριστούμε για τη συμβολή σας στην αρτιότερη προετοιμασία του προγράμματος.

Τομέας Επικοινωνίας ETI