BUILDING SOCIETY EXCELLENCE

YOUR MEMBERSHIP JOURNEY TO PROFESSIONALISM

Janice Hon | Associate Manager, APAC Society membership services
• Welcome Note by President of CFA Society Malaysia
• Overview of CFA Institute and CFA Society Malaysia
• How to earn your CFA Charter and Update Application Requirements
• Membership benefit
• Hearing from Recent Charterholders
• Q&A Session
LET'S CREATE JOBS, BUILD BRIDGES, ENSURE PROSPERITY. LET'S MEASURE UP.™

OPENING REMARK
JUSTIN ONG, CFA
ABOUT CFA INSTITUTE

CFA Institute is a global association of investment professionals.

We offer the **Chartered Financial Analyst (CFA)** designation, the **Certificate in Investment Performance Measurement (CIPM)** designation, and the **Investment Foundations** Certificate.

We also oversees the CFA Institute Research Challenge for university students and the Research Foundation of CFA Institute.

CFA Institute has more than 170,000 CFA charterholders in 165+ markets and 161 local member societies. We provide a variety of conferences, seminars, webcasts, and publications for our members to pursue continuing education and professional development. This allows our members to stay current on developments of the investment industry through membership.
ABOUT CFA SOCIETY MALAYSIA

CFA Society Malaysia is one of CFA Institute member societies and an association of local investment professionals, consisting of portfolio managers, investment advisors, educators and other financial professionals. They promote ethical and professional standards within the investment industry, encourage professional development through the CFA Program, and connect members to a global network of investment professionals.

CFA Society Malaysia was established in 1997 with more than 800 society members, including 104 investment professionals awarded the CFA charter in 2019.
CFA INSTITUTE MEMBERSHIP

Become a Regular Member and earn the rights to use the CFA® designation.
HOW TO BECOME A CFA CHARTERHOLDER

To earn a globally recognized professional designation – Chartered Financial Analyst (CFA), you must meet the following criteria and become a Regular Member of CFA Institute

01 Pass CFA Exams

CFA Program contains three levels of curriculum, each with its own exam. Passing the exam for all three levels is a requirement to obtain the CFA charter.

02 Achieve Qualified Work Experience

Complete work experience requirements before, during, or after participation in CFA Program. Your experience must be directly involved with the investment decision-making process or producing a work product that informs or adds value to that process.

03 Submit Reference Letters

In support of your membership application, you will need to provide 2-3 professional references. References will be asked to comment on your work experience and professional character.

04 Apply to Become a Charterholder

Apply to become a regular member of CFA Institute. Once your application is approved and you have joined CFA Institute, you will have earned the CFA charter.
CFA ACCOUNT: ACCESSING THE APPLICATION

From the "My Account" dashboard, please click on the Membership tile.
MEMBERSHIP APPLICATION: REGULAR MEMBERSHIP

To confirm / update your personal information, such as name, address, and phone number.

Membership Applications

Manage Applications

Demonstrate your commitment to the investment management profession
Join a global community of investment management professionals dedicated to high ethical and educational standards.

Apply for Regular Membership

Apply for Affiliate Membership

Learn More about Membership Requirements
MEMBERSHIP APPLICATION: SELECT A SOCIETY

When applying for a membership with CFA Institute, applicants will also apply for membership in a CFA society.

Regular Membership Application

Select Society

As a CFA Institute Regular member, you will be part of a global community with shared values of integrity and competency in investment practice. Active participation in CFA Institute and a CFA Society contributes to shaping the investment profession for the better.

By adding a society membership, you expand your support of the vital functions of ethical and educational leadership in your local community.

Select Your Society

Select Region

Asia Pacific

Select Society

CFA Society Malaysia

Step 2 of 6

Personal Information

Select Society

Education

Work Experience

References

Review and Submit

Save and Continue
MEMBERSHIP APPLICATION: WORK EXPERIENCE

Starting in August 2020, new work experience requirements will be applied to Regular membership applications, from four years to an equivalent 4,000 hours, completed in a minimum of 36 months.

Complete work experience requirements before, during, or after participation in CFA Program.

Regular Membership Application

Work Experience

Starting with your most recent employment, enter all positions where part of your work included evaluating/applying financial, economic, and/or statistical data as part of the investment decision-making process; supervising persons who conduct such activities; or teaching such activities.

Only hours spent performing qualifying activities count towards the required 4,000 hours of work experience over a minimum period of 36 months.

Total work experience: 0 Months 0 Hours

Step 4 of 6

- Personal Information
- Select Society
- Education

Work Experience

References

Review and Submit
WORK EXPERIENCE

When providing work experience details, applicants are required to enter the average number of hours they work per week and the percentage of time they spend performing work that meets the work experience requirement.

- Months are calculated using the dates entered in the start date and end date fields
- Hours are calculated by taking the average number of hours per week

**Qualifying work**
Evaluating or applying financial, economic, and/or statistical data as part of the investment decision-making process; supervising persons who conduct such activities; or teaching such activities.

Applicants should demonstrate their impact to the investment decision-making process and indicate how job duties produce work products that add value.
QUALIFYING DESCRIPTION

I prepare financial models based on reviewed information, analyze fundamentals, and value acquisition targets to provide recommendations to the investment committee.

Why It's Good

1. The applicant describes the types of independent analysis involved in this position.

2. The applicant creates financial models and investment recommendations as work products that influence investment decisions.
NONQUALIFYING DESCRIPTION

My work focuses on successfully managing key relationships with end-clients relating to a new Know Your Client (KYC) initiative.

What It's Missing

This applicant needs to submit additional job details. It is not clear that the position involves independent analysis, and it does not describe a work product that impacts investment decisions.

Improved Description

I develop and maintain strong working relationships with clients and communicate investment performance and strategy. I provide advice on a wide and diverse range of investment solutions customized to best meet the financial needs of those clients after thoroughly assessing financial fundamentals, reviewing business risk profile, and doing stress testing on cash flows.
NONQUALIFYING DESCRIPTION

I conducted an annual actuarial valuation process and benefit calculations.

What It's Missing

Although the applicant describes the types of independent analysis involved in this position, this description needs to better demonstrate how the analysis created a work product that added value to the investment decision-making process.

Improved Description

I conducted an annual actuarial valuation process and benefit calculations which included performing projections, cash flow analysis, and durational analysis of individual health insurance policies. These analyses had a direct bearing on the investments chosen to back the reserves for these blocks of business.
QUALIFYING WORK EXPERIENCE
At least 50% of your time should be spent directly involved in the investment decision-making process.

Regular Membership Application

**Add Position**
Starting with your most recent employment, enter all positions where you worked. Positions may have included evaluating/applying financial, economic and/or statistical data as part of the investment decision-making process: supervising persons engaged in such activities: or teaching such activities.

Only hours spent performing qualifying activities count towards the hours of work experience over a minimum period of 36 months.

**Employer/Firm Name** *
Bank of the Future

**Job Title** *
Credit Analyst

**Job Category** *
Analysis - Credit

**From** *
01/2010

**To** *
12/2019

What is the average number of hours per week for which you are paid or credited for working? *
50

What percentage of those hours do you spend performing activities such as evaluating or applying financial, economic, and/or statistical data as part of the investment decision-making process; supervising persons who conduct such activities: or teaching such activities? *
60

**Job Description** *
I prepare financial models based on reviewed information, analyze fundamentals, and value acquisition targets to provide recommendations to the investment committee.
**WORK EXPERIENCE SUMMARY PAGE**

Applicants can provide details for multiple jobs by clicking the "Add Position" button again.

<table>
<thead>
<tr>
<th>1</th>
<th>Employer Name</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Bank of the Future</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Job Title**
Credit Analyst

**Job Category**
Analysis - Credit

**Duration**
January 2010 - December 2019  
(120 Months)  
(15600 Hours)

- [Show Job Description](#)

- Add this work experience to my application.

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**Total work experience:**  
120 Months  
15600 Hours

[Add Position](#)
PROFESSIONAL REFERENCE

There are two ways an applicant can meet the reference requirement:

1. Provide **THREE** professional references

2. Provide **TWO** professional references include **ONE** is an active regular member of the society they are applying to
SUBMIT APPLICATIONS

When all steps are complete, applicants can review everything they have entered on the Review and Submit page. At the bottom of the page, the applicants must check the box to confirm that the information they provided is true and correct.

Once applicants submit their application, each new reference will receive an email requesting a recommendation on the applicants' behalf. Also, applicants will receive a confirmation email from CFA Institute.

Subject: Thank You for Submitting Your Application
To: leesa.gundy
From: info@cfainstitute.org

Leesa Gundy,

Thank you for submitting your application for membership. Your application will be reviewed when your references have been received. You may check the review status of your application through your account at any time.

While you wait, explore the benefits of membership and the products and services available to CFA Institute members.

Contact us at info@cfainstitute.org if you have any questions or concerns.

Regards,

CFA Institute
APPLICATION STATUS CHECK

Applicants navigate back to the "My Account" dashboard and click the Membership tile and see the status of their current application.

Membership Applications

Current Application
Regular Membership
Submitted: 15 June 2020
Status: Awaiting References

- View Details
- View / Manage References
- Withdraw

Fruit Fly
fruit.fly@mailinator.com

Relationship: Other professional reference

- Response Pending
- Resend Request
- Withdraw Request

Are you sure want to withdraw the reference?
- Cancel
- Withdraw

Dragon Fly
WHAT TO EXPECT AFTER YOU APPLY
CFA Institute may take up to 10 business days to review regular membership applications. When the final decision is made on an application, applicants will receive notification through email.

Subject: Membership Application Approved: Join Now
To: leesa.gundy
From: info@cfainstitute.org

Leesa Gundy,

Congratulations! You have been approved for affiliate membership with CFA Institute and CFA Society Virginia. Join now by completing your Professional Conduct Statement and paying dues.

Contact us at info@cfainstitute.org if you have any questions or concerns about your membership.

Regards,

CFA Institute
YEAH!
I RECEIVED AN APPROVAL EMAIL,
I AM A CFA CHARTERHOLDER NOW!

Not yet................why?
ACTIVATE YOUR MEMBERSHIP

→ Login to your CFA account and click Membership tile
→ Verify your personal and professional information
→ Complete the Professional Conduct Statement (PCS)
→ Click the checkbox to the CFA Institute Membership Agreement
→ Pay the dues (prorated dues scheduled for new members)

For example: New members join in September 2020 who pay only months remaining (10 months)

→ Checkout – Order confirmation
CONGRATULATION TO BECOME A CFA CHARTERHOLDER

Your membership allows you to enjoy the member benefits during the member year.
Member year runs from 1 July through 30 June.
CFA CHARTER

CFA Charterholders can expect to receive the printed charter in the next six to eight weeks upon the date of their confirmation submitted to CFA Institute.
MEMBERSHIP BENEFITS

CFA Institute Membership connects you with our global association of investment professionals and gives you access to benefits that help you pursue professional knowledge, advance in your career, and lead with ethics.
CAREER RESOURCES

Your dedication to ethics and staying ahead of an ever-changing marketplace is what sets you apart. Access our career and professional learning tools, resources, and content to position yourself for long-term success.

Career Resources

Take your career to the next level with exclusive career services and content.

Career Center
Stand out to employers, apply for jobs, and stay up to date on emerging trends with featured career management resources.

Career Tools
Log in to try the CV builder and interview simulator, take assessments, explore the asset library, and more.

Career Development & Soft Skills
Browse articles, videos, and webinars to help you manage your career as an investment professional.
PROMOTE YOUR PRESTIGIOUS DESIGNATION

A majority of candidates registering for CFA exams for career reasons, it is crucial to keep your "personal marketing materials" (i.e. CV/resume, LinkedIn, business cards and even email signatures) up to date to reflect your latest accomplishments in the CFA Program.

CFA Institute distributes digital badges to relevant candidates and CFA charterholders to showcase their achievements in an online, verifiable format.

There are essentially 3 badges available for:
NETWORK WITH INVESTMENT PROFESSIONALS

Explore the member directory and local networks through CFA Society membership.

Member Directory
Find and connect with CFA charterholders and members of CFA Institute.

Search the Directory

CFA Society® Community
Join a society to build your local network, raise standards, and effect change in your market.

Find a Society
CFA® SOCIETY MEMBERSHIP

Society membership is your global passport in the investment management industry which allows you to meet with other global investment management professionals through local society events and Global Passport Program.
CFA SOCIETY MEMBERSHIP BENEFITS

Key Benefits of Joining a CFA® Society
- Networking and Volunteering Opportunities.
- Access to Exclusive CFA® Society Member-Only and other events
- Professional Development Opportunities
- Career Assistance
- CFA® Continuing Education
- Discounts to dynamic and educational local programs

Global passport program
The Global Passport Program allows members of participating CFA Societies to attend other societies' events at the local member price.

If you are traveling, contact the local society at your destination using the Global Society Directory to learn about eligible events and other networking opportunities.
CFA SOCIETY MALAYSIA CAREER PORTAL

- Refer to the link for more details
  https://info.cfainstitute.org/malaysia-career-portal.html
CFA SOCIETY MEMBERSHIP BENEFITS

Waiver / Exemption
CFA Institute is recognized worldwide as the leading credentialing body for investment managers. Your current or past participation in CFA Institute educational programs may enable to waive certain requirements for other financial credentialing products, services or organizations.

✓ Member will be eligible to bypass the Level 1 CIPM ® exam.
✓ Locally the Securities Commission (SC) has granted an exemption to CFA Charterholders from 4 licensing examinations that are required for individuals who wish to act as intermediaries in the Malaysia Capital Markets. SC recognizes the CFA Charter as fulfilment of the examinations for:

• Module 7: Financial Statement Analysis and Asset Valuation
• Module 10: Asset and Funds Management
• Module 12: Investment Management and Corporate Finance
• Module 14: Futures & Options
USING THE CFA DESIGNATION

CFA charterholders are those individuals who have earned the right to use the CFA designation granted by CFA Institute.
CFA DESIGNATION

Once granted the right to use the designation, individuals must also satisfy the CFA Institute membership requirements to maintain their right to use the designation on annual basis.

If a CFA charterholder fails to meet any of the membership requirements or has violated the CFA Institute By-law or Code of Ethics and Professional Standards, he or she may be prohibited to use the CFA designation. Until membership is reactivated, individuals must not present themselves to others as CFA charterholders.

The CFA® mark must appear in all capital letters. With respect to Chartered Financial Analyst®, at a minimum, the first letter of each word must be capitalized.

John Smith, CFA
John Smith, Chartered Financial Analyst
HEARING FROM RECENT CHARTERHOLDERS

SU JE HUI, CFA
CHAN EAK-KUAN, CFA
HEARING FROM RECENT CHARTERHOLDERS

CHAN EAK-KUAN, CFA
Eak-Kuan is a treasury product structurer attached with the Institutional Sales desk under Hong Leong Bank’s Global Markets division. His key areas of focus are yield enhancement strategies on single or multi-asset structures for institutional and financial intermediary clients.

SU JE HUI, CFA
Je Hui is currently a manager with Deloitte Risk Advisory, specialized in credit risk modeling and compliance advisory for financial institutions, covering Basel Credit Risk Modeling, IFRS 9 Impairment Modeling and compliance review.
Q & A SESSION

Any questions?
THANK YOU

For inquiry:
Please contact our team
CFA Society Malaysia representative
admin@cfamalaysia.org

APAC Society Membership Services Representative
janice.hon@cfainstitute.org