Preparatory Course for Chartered Financial Analyst® (CFA®) Examination

Demonstrate Your Mastery of Investment Analysis and Decision-making Skills

- Exclusive CFA® training provider for CFA Singapore
- Approved Prep Provider by CFA Institute
- Kaplan Financial and Kaplan Schweser — a compelling combination in CFA® training
- Schweser study materials — including our world renowned SchweserNotes™
- Thousands of students have gone through our doors
- Voted Best Corporate Training Provider for Finance Management, Computer Science & IT, Leadership in 2016*
- Voted Top 3 Private School in Singapore (2013 to 2016)**

* JobsCentral Learning, Training & Education Development Awards 2016.
** AsiaOne People’s Choice Awards.
Part of Kaplan Learning Institute, Kaplan Financial is one of Singapore’s leading providers of professional accounting and finance programmes, having trained thousands of students to date.

With a focus on training excellence, Kaplan Financial has been accorded a number of honours by our partners, demonstrating our commitment to achieve excellent standards of learning facilities and provide outstanding student support. Widely recognised as an institution with dedicated lecturers and a proven track record of exceptional pass rates, Kaplan Financial will equip you with the skills and confidence you need to shine in the challenging accounting and finance industry.

WHY KAPLAN FINANCIAL?

ACCRREDITATIONS
ACCA Approved Learning Partner (ALP) – Student Tuition Platinum Status, Accredited Learning Organisation (ALO) for Singapore CA Qualification (formerly known as Singapore QP) by the Singapore Accountancy Commission (SAC), Registered Tuition Provider for CPA Program by CPA Australia, Training provider for CAIA®, Exclusive CFA® training provider for CFA Singapore and Approved Prep Provider by CFA Institute.

EXTENSIVE
Well-established with a complete range of professional accounting and financial courses in Singapore, catering to all levels.

EXPERIENCE
To date, thousands of students have been through our doors. We boast one of the largest accounting and finance lecturer teams, who bring with them an invaluable pool of experience which our students can readily tap on.

ACCESSIBILITY
Our centrally-located campuses at Wilkie Edge and PoMo facilitate your learning.

REPUTATION
Voted Top 3 Private School in Singapore (2013 to 2016) by AsiaOne People’s Choice Awards.

ABOUT CFA SINGAPORE

Founded in 1987, CFA Singapore is the first CFA chapter to be formed outside of North America and one of the most active societies of the CFA Institute, the not-for-profit global association of investment professionals that sets the standard for professional excellence and credentials. CFA Singapore is the 7th largest society globally with more than 3,500 members and organises about 100 events a year.

The mission of CFA Singapore is to lead the investment profession by promoting the highest standards of ethics, education and professional excellence for the ultimate benefit of society. This is implemented by member volunteers through the following 8 committees: Advocacy, Asset Management, Candidate Programmes, Career Development, Membership, Networking, Professional Development & University Outreach.

In October 2016, CFA Singapore appointed Kaplan Learning Institute to be the exclusive training provider for the CFA Singapore Research Programme Level 1 & 2, live and online preparatory courses for the Chartered Financial Analyst® exams. CFA Singapore Research Programme Level 1 & 2 are accredited under the Institute of Banking and Finance Singapore Standards Training Scheme (IBF-STS).

For more information, please visit www.cfasingapore.org or email info@cfasingapore.org.
If you’re interested in a career in banking and financial services then earning the CFA® Charter is your next step.

There are many benefits of earning the CFA® Charter when you step into this industry of opportunities:

**Real-world Expertise**
Being a CFA® Charterholder demonstrates your fluency with an advanced investment management and analysis curriculum that leverages current best practices and the experience of practitioners around the world to bridge real-world practices and theoretical knowledge.

**Industry Recognition**
Stand out in the competitive global industry and gain instant credibility with peers, clients and hiring managers who know the intelligence, hard work, and profound commitment it takes to earn the CFA® Charter.

**Ethical Foundation**
Learn to apply ethical principles and gain a foothold in the skills needed to demonstrate a commitment to high standards of accountability and integrity that build a trusted reputation.

**Join the Global Community of Professionals**
Join a vast professional network of more than 135,000 CFA® Charterholders worldwide and gain unmatched career resources, important relationships, and lifelong insights.

**Qualification in Demand**
The top 11 global employers of CFA® Charterholders include [JPMorgan Chase, Bank of America, Merrill Lynch, UBS, RBC, HSBC, Wells Fargo, Credit Suisse, Morgan Stanley, Smith Barney, BlackRock and Citigroup](#).
You can enrol in the CFA® programme to begin earning the CFA® Charter, one of the most respected and recognised investment management designations in the world.

The CFA® programme provides a strong foundation of advanced investment analysis and real-world portfolio management skills that will give you a career advantage. It also covers essential concepts and skills that you can apply at all stages of your career.

Completing the CFA® programme shows employers and clients you have mastered a broad range of practical portfolio management and advanced investment analysis skills.

Based on the top CFA® Charterholders Occupation chart provided by CFA institute, you will be able to identify the potential career paths you can pursue with the CFA® Charter in the future.

*These occupations were self-reported by CFA® Charterholders to CFA institute as of January 2016. The details were not verified by CFA institute. The remaining 30% of the occupations not reflected in the chart are CFA® Charterholders who do not fall into these listed professions. All information are extracted from CFA Institute and are accurate at time of print (April 2017). KLI reserves the right to vary this information should the circumstances so require.
**Entry Requirements and Related Experience**

You will need to sign up as a CFA® candidate and enrol in the CFA® programme. To do so, you must:

1. Meet one of the following criteria:
   - Have a Bachelor’s (or equivalent) Degree,
   - Be in the final year of a Bachelor’s Degree programme,
   - Have four years of professional work experience, or
   - Have a combination of professional work and university experience that totals at least 4 years,
2. Be prepared to take the exams in English
3. Have a valid international passport
4. Meet the professional conduct admission criteria
5. Join CFA Institute as a regular member

**Examinations**

You will also need to complete and pass the following:

1. Level I Exam (June or December)
2. Level II Exam (June)
3. Level III Exam (June)

All the information above are extracted from CFA Institute and are accurate at time of print (April 2017). KLI reserves the right to vary this information should the circumstances so require.
322 Hours*  
Average Exam Preparation Time For CFA® candidates

In a survey done in June 2016, most candidates spent an average of 322 hours preparing for the exam, with Level III candidates reporting the most time preparing.

334 Hours*  
Exam Preparation Time

This exam requires synthesis of all the concepts and analytical methods in a variety of applications for effective portfolio management and wealth planning.
• Constructed response (essay) questions (usually between 8 and 12 questions, each with subparts)
• 10 item set questions

329 Hours*  
Exam Preparation Time

The Level II exam emphasises more complex analysis, along with a focus on valuing assets.
• 120 items (20 vignettes with 6 items each)
• All 120 items are equally weighted

304 Hours*  
Exam Preparation Time

The Level I exam consists of basic knowledge and comprehension questions focused on investment tools; some questions will require analysis.
• 240 multiple choice questions for all topics

Useful Information

• For each exam level, you will need to plan for at least 6 months of preparation.
• You will need to complete the 3 exams sequentially and accumulate 48 months of approved work experience.
• Most successful candidates take an average of 4 years to complete the programme.

*All the information above are extracted from the CFA June 2016 exam candidates survey and are accurate at time of print (April 2017). KLI reserves the right to vary this information should the circumstances so require.
WHY SHOULD KAPLAN BE YOUR PREFERRED CHOICE?

With our extensive experience and accreditations, we are committed to providing high quality tuition and learning experience support for students in their journey to CFA® Charterholder:

**Exclusive Training Provider for CFA Singapore**

CFA Singapore, a member of CFA Institute, has appointed Kaplan Learning Institute as the exclusive training provider for Chartered Financial Analyst (CFA) examination preparation including CFA Singapore programmes accredited under the Institute of Banking & Finance Standards Training Scheme (IBF-STS) that endorses individuals for their professional excellence, integrity and commitment to the financial scene.

Under IBF-STS, eligible students can obtain funding assistance to defray considerable direct training costs when they pursue these internationally-benchmarked and highly recognised certification programmes.

**Approved Prep Provider by CFA Institute**

As an Approved Prep Provider by CFA Institute, we stay current with regards to candidate trends and operational changes for CFA Institute programmes. We also have uniform compliance with high standards of communication with regards to the supplemental role of prep provider products in CFA® candidate exam preparation.

**Kaplan Schweser Study Materials**

We are the official distributor in Singapore for Schweser, a leading global provider of educational tools and products for financial advanced designations.

Together we can offer a choice of study packages to suit your face-to-face classroom lessons or self-study needs for your upcoming CFA® exam.
With an experienced pool of lecturers, we believe in continuously inspiring and helping CFA® candidates on every step on their CFA® exam journey.

Richa Gupta
CFA®, PGBA (Finance & Information System), B.E. (Electronics and Communication)

- Chartered Financial Analyst (CFA®) and mentor for candidates studying for the level I CFA® Examination.
- Always focused on getting students to understand fundamental concepts and apply them during examinations.
- Awarded the scholarship for CFA® Level III by CFA Singapore.
- Held distinction in both PGBA in Finance & Information Systems and Bachelor of Engineering in Electronics & Communication.
- 10 years of teaching experience in the area of finance and is the Subject Matter Expert (Finance) for the diploma programmes in Kaplan, Singapore.
- In her overseas assignments, she taught Portfolio Management and Asset Allocation to MBA students at the Indian Institute of Planning and Management (IIPM) for their Wealth Management Programme.
- Previously conducted on Banking, Investment Analysis and Portfolio Management and other finance modules at various universities such as University of Essex (UK) and Murdoch University (Australia).
- Previously conducted lectures for the Financial Management module in the foundation programme that leads to the professional programme of the Singapore Qualification Programme (QP) and the revision course for the Financial Strategy (F3) for the Chartered Institute of Management Accounting (CIMA).

Wong Choon Yuan
CFA®, FRM, MSc. Financial Engineering, MSc. Applied Finance, B.E. (Chemical Engineering)

- Chartered Financial Analyst (CFA®) and mentor for candidates studying for the level II CFA® Examination.
- Over 10 years of working experience in Banking and Finance industry with prior experience in feedstock optimisation in the Oil and Gas industry.
- Conducted lectures on Hedge Funds and Portfolio Management in MSc. Financial Engineering at National University of Singapore (NUS) and MSc. Applied Finance and MSc. Wealth Management at Singapore Management University (SMU).
- Published a hedge fund research paper in Journal of Wealth Management, Spring 2006.

Dr Nilanjan Sen
Ph.D., CFA®, Associate Dean (Graduate studies) and Associate Professor of Banking and Finance at Nanyang Business School, NTU

- Chartered Financial Analyst (CFA®) and mentor for candidates studying for the level III CFA® Examination.
- Concurrently holds an adjunct Associate Professor position at Lorange Institute, Zurich.
- Received his Ph.D. from Virginia Tech and was a faculty member at Arizona State University prior to joining NTU, Singapore.
- Published extensively in academic as well as practitioner journals and currently teaches corporate and international finance.
- Presented in several international conferences and presently works in the area of corporate governance and international dividend policy.
- Provided leadership in several key initiatives in his 8 year at Nanyang Business School.
- Worked with several leading U.S. universities to launch various Advanced Management Programmes that addresses industry specific needs.
- Substantially expanded the open and custom programme portfolio that includes specialized program for banks and MNCs in one of the highest growing region.
- Conducted training programmes for several corporations, banks and government agencies.
- Was the chief examiner for Certified Investment and Security Analyst Institute (CISA), Thailand, and has worked with several U.S. based preparatory programmes for CFA® examinations.
- Currently conducts executive training programmes for Cornell-NTU Institute, Nanyang Executive Education as well as CFA® review programmes for the Financial Training Company.
- Recipient of the researcher of the year award from School of Global Management and Leadership, Arizona State University and best teacher award from the division of Banking and Finance, Nanyang Business School in 2004.
Our comprehensive learning strategy, known as The Kaplan Way is one of the most effective and comprehensive study packages in the industry which employs a three-phase learning strategy to support your CFA® study plan:

**PREPARE**

**Education Course**
(Level I, II and III)
Classroom and Schweser Study Materials

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Our education course is designed to help you build the core knowledge and support your CFA® exam preparation.

Combined with quality Schweser study materials, the course includes workings and examples to help you develop clear and thorough understanding of the key topics, CFA Institute prescribed Learning Outcomes Statements (LOS) and ultimately focus on the knowledge you needed for the exam.

To accommodate your study plan around your work, family and other important commitments, we offer full-time or part-time lessons which are spread evenly over the months leading to the exam day.

**Course Materials**
- Schweser Essential Self-study Package
- Schweser Weekly Live Online Class

**PRACTICE**

**Revision Course**
(Level I, II and III)
Classroom and Study Materials

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Our revision course is aimed at helping you discover the key subject areas and dive deeper into more challenging concepts which are usually tested during exams.

The course also includes practice questions for you to revise and be more confident on the day of the exam. You will also be able to:
- Identify topics where you are weak in
- Crystallise your understanding of all the tested topics
- Improve your answer application skills for common exam questions

**For non-Education Course Candidates**

Students who did not enrol for the education course are welcome to join our revision course. But you are encouraged to build your understanding of the topics through your own self-study.

**Course Materials**
- Kaplan Revision Mindmap Book
- Kaplan Revision Question Bank

**PERFORM**

**Live CFA® Mock Exam**

We provide live mock exam session which includes an invigilator, exam questions and exam rules to simulate an actual CFA® exam. After this mock exam, answers and a 10-hour online tutorial on the practice questions will be provided.

**Schweser Online Mock Exam**

Alternatively, you can take a live mock session anywhere, anytime. You are also able to view explanations to answers, check your score compared to those of other candidates, and drill deeper into each question with our Mock Exam Tutorial.

**Course Materials**
- Mock Papers for Live CFA® Mock Exam
- Online Schweser Mock Exam
The Essential Self-study Package is a key component to a successful CFA® exam study programme. This study package combines candidates’ favourite study tool, SchweserNotes™, with three full-length practice exams and the go-anywhere QuickSheet. Connect with expert CFA® instructors and use your Study Calendar to create a detailed study plan. It contains the following:

SchweserNotes™ Volumes 1-5
The 5-volume SchweserNotes™ is the key component as you prepare for the CFA® exam. They provide clear, concise study notes and examples that cover every Learning Outcome Statement. Measure your progress with practice questions and realistic self-tests at the end of each topic.

Schweser’s QuickSheet
Prepare for the CFA® exam on the go! This compact study tool summarises key formulas, definitions, and concepts.

Practice Exams
Once you know the concepts, apply the knowledge with 6 full-length practice exams. Identify the topics you are weak in, master the material, and gain the confidence you need to perform your best on the actual CFA® exam. Each volume of Practice Exams includes 3 full exams, as well as the Online Performance Tracker, which allows you to compare your scores to other candidates.

Study Calendar
This innovative tool takes the guesswork out of creating a prep plan! Prepare with a detailed study plan that shows you how to use your study materials in the most effective way possible.

Instructor-Led Office Hours
Connect with a CFA® expert during designated time to get your exam and content-related questions answered.

SchweserPro™ QBank
After reading the SchweserNotes™, you can put what you’ve learned to practice with the QBank. Focus your attention where you need it the most and review critical concepts. It allows you to:
- Quiz yourself with thousands of multiple-choice questions
- Build custom exams using the topics and the number of questions you select
- View answer explanations and LOS summaries
- Access your QBank online, with available offline access

101 Must Knows
This late-season online study tool will give you practice answering exam-like questions based on the core concepts of the CFA® curriculum. These quizzes, and included tutorials, are an ideal way to help you grasp the fundamentals of each topic as you advance with your study plan.

Schweser Weekly Live Online Class
There is no better way to ensure content retention and instil exam confidence than by reinforcing your studies with Schweser Live Weekly Classes online. Should your work or other commitments affect your classroom attendance, our 15-week block of Online Classes led by CFA® charterholders can help you cover the same material at the same pace and frequency as our classroom sessions. It includes:
- On-Demand Video Lectures which are designed to be viewed prior to the Weekly Classes, covering every LOS.
- Archived sessions for you to review at your own pace.
- Two-volume set of Weekly Class Workbooks containing material, examples, and questions to support your study plan.

Schweser Online Mock Exam
Schweser Online Mock Exam is as close to the actual CFA® exam in format, difficulty, and length. The Mock Exam helps develop your test-taking skills, identify your weak topics, and validate your mastery of the CFA® curriculum. It includes:
- Fully proctored and timed 6-hour exam (two 3-hour sessions)
- CFA Institute topic weightings
- Printed answer key and online answer explanations
- Online scoring and performance tracking with a comparison to other Mock Exam takers
- LOS and CFA curriculum page references for every question