



INTERNATIONAL  
COLLEGE OF  
FINANCIAL PLANNING™  
RULE THE WORLD OF FINANCE

Approved Prep  
Provider



CFA Institute



Awarded  
**Best Finance College**  
2019 by ET Now



**CFA® Charter - A Smart  
Investment for a Bright Future**

**Join ICoFP's Prep Course  
for Level I of the CFA® Program**

[www.icofp.org](http://www.icofp.org)

PROMOTED BY  
 **BajajCapital**  
India's Leading Financial  
Services Company

## ABOUT US

International College of Financial Planning (ICoFP), established in the year 2002 is an educational initiative of the **Bajaj Capital Group**. It is one of the leading providers of education on Capital Markets, Financial Planning, Financial Analysis and Wealth Management. Our promoter, the Bajaj Capital Group is one of India's oldest and largest investment services firm with a heritage of over five decades and having served a million plus Indian Investors across the world. ICoFP is an **Authorised Prep Provider** of the prestigious **CFA Institute, US** for the CFA® Program.

## WHAT IS CFA® COURSE

The Chartered Financial Analyst® (CFA®) Program is a globally recognized investment professional credential which is offered internationally by the US based CFA® Institute. The CFA® designation is one of the most respected and recognized finance qualification accepted worldwide. The CFA® program is a globally recognized standard for measuring the proficiency and integrity of finance and investment professionals.

The Chartered Financial Analyst® (CFA®) credential is held by over 150,000 professionals around the world. The charter gives a strong understanding of advanced investment analysis and real-world portfolio management skills.

## PROGRAM BENEFITS



**Gold Standard:** The CFA® charter equips you not only to enter the profession, but also to excel at all stages of your career.



**Unmatched Expertise:** Our rigorous curriculum will equip you for complex investment decisions.



**Strong Ethical Foundations:** Gain confidence and clarity in navigating ethical issues.



**Prestigious Network:** Connect with an exclusive group of outstanding investment professionals.



**Global Passport:** Earn waivers from regulatory agencies, graduate programs, and more.



**Career Resources:** Gain access to career guides, thought leadership, and continuing education.

## CFA® PROGRAM OVERVIEW

The CFA® Program curriculum is offered only in English and so are the exams. The curriculum is organized into three levels and at ICoFP, each level is organized into 24–26 study sessions. Each study session includes assigned readings, learning outcome statements (LOS), and problem sets. All exam questions are based on the content in the corresponding curriculum for that level. Each exam question is based explicitly on one or more LOS. The CFA® Program curriculum increases in complexity as you move through each level.

# PROGRAM CURRICULUM

Topics and Structure	Level I	Level II	Level III
Ethical and Professional Standards	15%	10-15%	10-15%
Quantitative Methods	10%	5-10%	0%
Economics	10%	5-10%	5-10%
Financial Reporting and Analysis	15%	10-15%	0%
Corporate Finance	10%	5-10%	0%
Equity Investments	11%	10-15%	10-15%
Fixed Income	11%	10-15%	15-20%
Derivatives	6%	5-10%	5-10%
Alternative Investments	6%	5-10%	5-10%
Portfolio Management & Wealth Planning	6%	5-15%	35-40%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

## About the Levels:

### Level I

- Introduces various topics like equity, derivatives etc. which are eventually used for creating portfolios
- Exam is offered in June and December
- Comprises of 240 Multiple Choice Questions (120 questions each in the morning & afternoon sessions)

### Level II

- Emphasizes on application of various tools like quantitative analysis, portfolio analysis for doing asset valuation
- Exam is offered only in June
- Comprises of 120 Multiple Choice Questions (20 caselets with six questions each)

### Level III

- Focuses on Portfolio Management and strategies for creating specific portfolios for individuals and institutions
- Exam is offered only in June
- Comprises of Essay Type Questions and Multiple Choice Questions

## CFA<sup>®</sup> EXAM CENTERS

- The **Dec** exams are being offered at test centers located in:

**1. MUMBAI 2. KOLKATA 3. BANGALORE 4. NEW DELHI 5. LUCKNOW**

- The **June** exams are being offered at test centers located in:

**1. MUMBAI 2. KOLKATA 3. BANGALORE 4. CHENNAI 5. NEW DELHI 6. AHMEDABAD  
7. PUNE 8. BHOPAL 9. LUCKNOW 10. HYDERABAD**

# ELIGIBILITY FOR CFA® CHARTER

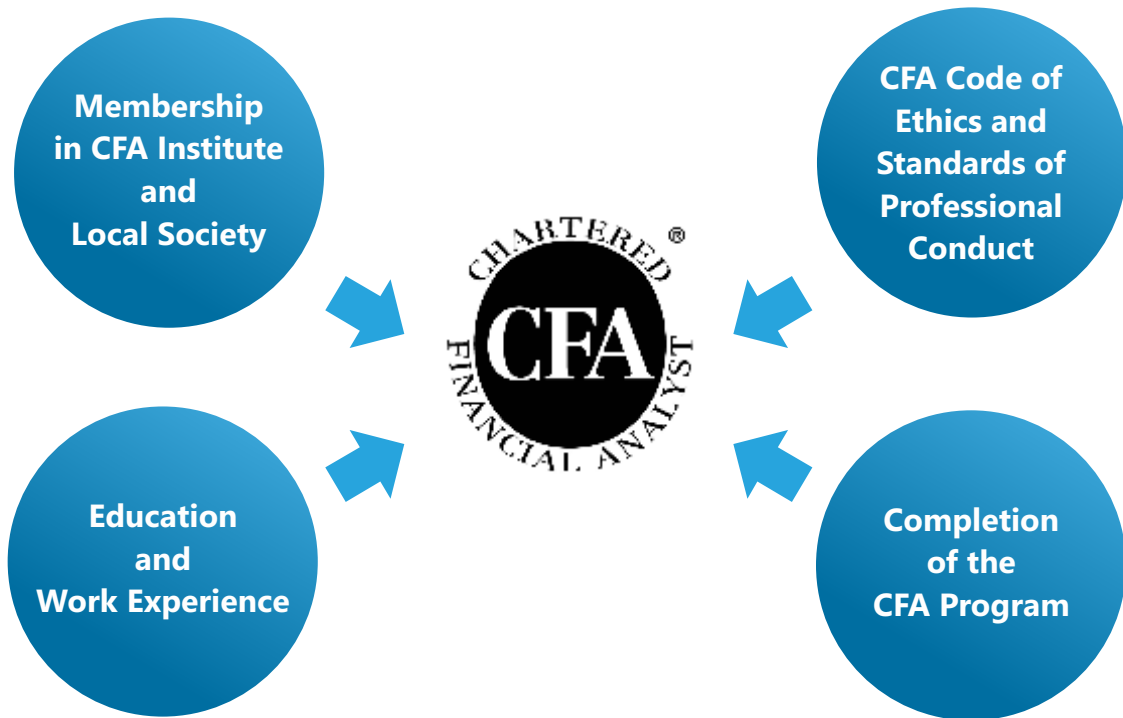
## Minimum Eligibility

**CFA® Level I Exam** : Even a final year graduate can appear for CFA® Level I exam (**Passport Mandatory**)

**CFA® Level II Exam** : Applicant should have completed graduation and cleared CFA® Level I exam

**CFA® Level III Exam** : Applicant should have cleared CFA® Level II exam

**CFA® Charter Holder Membership** requirements include, but not limited to, 48 months of acceptable professional work experience and passing the Level I, Level II and Level III exams.



**About the Exam:** Administered by CFA® Institute, US

■ Minimum Time to pass all three exams: 2 years

■ Average Time: 4 years

## WHY ICoFP

- Promoted by Bajaj Capital Group, one of the largest investment service firms in India with a heritage of over five decades and having served a million plus Indian Investors across the world
- One of the select institutes in India offering super specialized education in the field of financial analysis, financial planning, technical analysis and more
- Authorised Education Partner for international certifications like CFP<sup>CM</sup>, CFA®, and more
- Trained over 12,000 professionals and students in past 18 years
- Over 8 years experience of delivering CFA® curriculum as part of MBA (Financial Analysis)
- Online Technology Platform and relevant content (Including video tutorials)
- Conceptual learning complemented with practical application and a rigorous testing framework

# ABOUT ICoFP'S LEVEL I PREP COURSE

Passing Level I is the first step to becoming a CFA® Charterholder and advancing your finance career. The CFA® Level I examination is administered twice per year in June and December. It focuses on analysis using the tools of ten topic areas of the Candidate's Body of Knowledge. These areas are ethical and professional standards, quantitative methods, economics, financial reporting and analysis, corporate finance, equity investments, fixed income, derivatives, alternative investments, and portfolio management and wealth planning. The exam format is 240 multiple choice exams to be completed within 6 hours. The June 2018 Level I exam pass rate was 43%.

ICoFP's Level I Prep Course ensures exam-taking confidence in learners with over 120 hours of intensive training delivered through **Live Online Classroom Sessions**. These sessions are conducted by highly experienced professionals who come with relevant industry experience as well as years of excellence in academic delivery in the financial analysis domain. The Prep course is designed to give more time to difficult topics & subjects with higher exam weightages.

## LIVE ONLINE CLASSROOM SESSIONS

**Level I Prep Course for CFA® Program is delivered through Live Online classes conducted using the professional Zoom Platform. The platform connects all participants in a virtual classroom where they receive training from an expert via online classroom sessions. Participants are interconnected via audio and video, enabling them to interact both with the instructor and fellow classmates.**

## PROGRAM FEATURES



### Live Online Classroom Sessions (LOCS)

24 days (120 hours) of Live Online Training by Experienced Professionals. (5 Hours/Day)



### Live Online Doubt Clearing Sessions

2 days (10 hours) of doubt clearing sessions for last moment revision and exam preparation tips.



### Comprehensive study notes

Topic wise study material provided in the form of presentations which can be referred to while watching the videos



### CFA Textbook Questions & Examples

Important examples and questions from the textbook discussed at length during the session



### Mock Tests

1 Full-Length Mock exam (two sessions of 3hrs each)



### Exam Prep Tips

Right guidance and tips provided to prepare learners for the 'BIG DAY'



### Support

Online access to materials and recordings, Doubt solving forum to interact with faculty and fellow students.



### LOCS Recordings

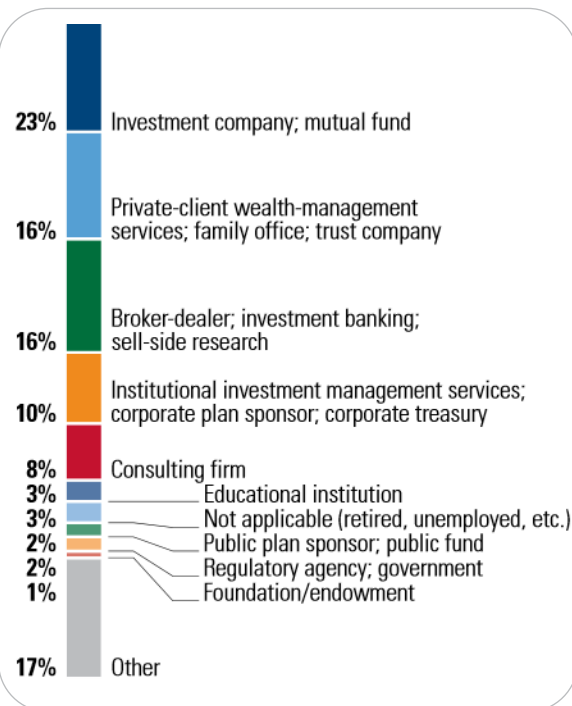
Recordings of 24 days of Online Training by Experienced Professionals

## CAREER OPPORTUNITIES

CFA® Charter provides you with a strong foundation for a variety of career choices in the investment profession

Financial Institutions like Investment Banks, Commercial Banks, Asset Management Firms, Insurance Companies, Securities Regulator, Hedge Funds, Financial Institute, Universities, Credit Rating Firms, etc. prefer professional with CFA® designation.

Organizations like JP Morgan Chase, Bank of America, Citibank etc. not only encourage their employees to take these exams but they also sponsor the fee.



Source: cfainstitute.org

### The CFA Institute provides the following breakdown of the most common professions:

- 5% Corporate Financial Analyst
- 5% Financial Advisor
- 23% Portfolio Manager
- 6% Risk Manager



- 5% Relationship Manager
- 16% Research Analyst
- 7% Chief Executive
- 7% Consultant

## OUR OFFICES

**Delhi :-** ICoFP, 3rd Floor, Gulab Bhawan, 6, Bahadur Shah Zafar Marg, New Delhi – 110002

**Mumbai :-** C/O Kiran Devi Saraf Institute of Complete Learning(KSICL), 3RD Floor, R S Campus, Opposite Bajaj Hall, S V Road Malad (West), Mumbai – 400064

**Mysore :-** 169/1, New No. 29/1, 3rd Stage, Industrial Suburb, Fort Mohalla, Manandhavadi Road, Mysore – 570008