

CFA Institute Investment Foundations™



CFA Investment Foundations Certificate™

A CLEAR UNDERSTANDING OF THE INDUSTRY

Is CFA Institute Investment Foundations™ Right for You?

Investment Foundations is a comprehensive global education certificate program that provides a clear understanding of investment industry essentials. Whether you're just starting a career in financial services or want to learn essential industry concepts, Investment Foundations offers an accessible solution for breaking through the complexities of the global investment industry and raising your professional profile.

The Big Picture

The certificate program is designed for all professional disciplines outside of investment roles, including IT, operations, accounting, administration, compliance, legal and marketing. There is no education or experience requirement and the exam can be taken at your convenience at available test centres around the world.

The CFA Institute Investment Foundations™ certificate program covers the essentials of finance, ethics, and investment roles, providing a clear understanding of the global investment industry.

By completing the program and earning your certificate, you will:

- Gain a fundamental framework and knowledge of investment industry
- Stand out from the crowd in a competitive global job market
- Improve your job performance by gaining an understanding of common global industry standards
- Gain a better understanding of how your role impacts the rest of the business
- Feel more confident working with your colleagues and clients

The Investment Foundations certificate program provides a fundamental understanding of the investment industry through the following seven topic areas.

<p>Industry Overview</p> <p>It is about getting to the heart and the core purpose of the investment industry – its vital role in the world: from helping people save for the future to funding schools, hospitals, roads and other essentials. The benefits this brings when done well (ethically and all parts working together) help serve society.</p>	
<p style="text-align: center;">Inputs and Tools</p> <p>This is about understanding how the (economic) world works – the big picture and the fine detail. How the actions of individuals, corporations and governments play out at micro, macro and international levels, how this translates to a company’s finances, and how to get a clearer understanding of what this all means.</p>	<p style="text-align: center;">Investment Instruments</p> <p>This module covers the basic investment options, what they are and their purpose – from conventional equities and bonds to more specialized investments such as real estate and derivatives.</p>
<p style="text-align: center;">Industry Structure</p> <p>The industry is complex and highly interdependent. This module looks at how the industry helps us invest, who the participants are and what they do, the different markets where investments take place, and the investment products themselves.</p>	<p style="text-align: center;">Serving Client Needs</p> <p>This is about focusing on clients – gaining a clear understanding of their needs, circumstances, motivations and ambitions so investments can be allocated and managed in the right way for them.</p>
<p style="text-align: center;">Industry Controls</p> <p>Controls are critical in helping ensure everything runs smoothly. In the fast moving world of investments and risk it is essential to understand how systems and controls are used in the industry to ensure the client is properly served.</p>	<p style="text-align: center;">Ethics and Regulation</p> <p>This module focuses on the essential foundations for the investment world – ethics and regulation. The firm ground on which we build for our clients: trust, reputation, confidence and value – the essentials of a strong and healthy client-focused industry.</p>

EIMF study option

We offer a comprehensive 20-hour teaching programme with an experienced CFA charter holder. The aim of the programme is to cover all the relevant content so participants will get the required knowledge. At the end of the programme an EIMF attendance certificate will be given that can also be accepted for CPD requirements. Participants who choose to take the exam must register via the CFA website and pay the exam fee of US \$250. You will have 6 months to take the exam after you register. [Visit the CFA website to register for the exam.](#)

The Investment Foundations exam is offered at many Pearson VUE test centers around the world. [See exam centres in your area here.](#)

About the CFA Institute

CFA Institute is the global association of investment management professionals that sets the standard for professional excellence and credentials. The organization is a champion for ethical behavior in investment markets and a respected source of knowledge in the global financial community. The end goal: to create an environment where investors' interests come first, markets function at their best, and economies grow. CFA Institute has more than 130,000 members in 140 countries and territories. For more information, visit www.cfainstitute.org

WHAT YOU LEARN

The certificate program covers the essentials of the investment management industry:



Module 1:
Industry
Overview



Module 2:
Ethics and
Regulation



Module 3:
Inputs and
Tools



Module 4:
Investment
Instruments



Module 5:
Industry
Structure



Module 6:
Serving Client
Needs



Module 7:
Industry
Controls

HOW WILL YOU BENEFIT



Clarity

Benefit from having a common understanding of industry structure and terminology, regardless of your job function or geographic location.



Collaboration

Work more effectively with global colleagues by understanding industry functions, building stronger relationships and raising your professional competence.



Confidence

Gain the knowledge to identify issues and the confidence to speak up. Get a better sense of your role and how you connect with the complex global industry at large.