



CFA® Program Exam Prep Courses 2022 Level I (for Nov exam)

COURSE OBJECTIVE

Hong Kong Investment Training Institute Limited (HKITI) aims to equip students with comprehensive knowledge in financial reporting & analysis, quantitative & economics, asset valuation and portfolio management. Throughout the class, our trainer will arouse students interest in the subject areas through real life examples in Hong Kong context.

WHY HKITI?

Studying is many students' big investment in their career life. DO NOT risk your time and money in a school the lacks **quality** and **experience**.

- ✓ **High Quality** teaching (rated by students at 4.8/5.0 in Cohort 2017/18)
- ✓ **Immediate Feedback** to students questions (rated by students at 4.85/5.0 in Cohort 2017/18)
- ✓ **FULL-TIME** Lecturer since 2005
- ✓ **SMALL CLASS SIZE** to allow you to ask questions freely and receive feedback promptly
- ✓ Practical teaching with examples of Hong Kong companies

*This is a registered non-local course (No. 362928). It is a matter of discretion for individual employers to recognise any qualifications to which this course leads to. CFA Institute required disclosure: CFA Institute does not endorse, promote, or warrant the accuracy or quality of the products or services offered by Hong Kong Investment Training Institute Limited. CFA® are trademarks owned by CFA Institute.

LECTURER

Ted specialises in investment, asset valuation and economics. He is one of the **most experienced CFA trainer with over 15 years of experiences** in teaching and more than 10 years of experiences in investment research. Ted conducted research on property market as well as financial analysis on investment projects in Hong Kong. He was once acted as a consultant to MTRC and the Hong Kong Airport Authority and as an in-house trainer for Langham Hotel Group.



Ted Kwan, CFA

Ted is highly applauded for **his clarity in explaining difficult concepts** and has **taught over 1,000 CFA candidates**. He was the lecturer in Kaplan Financials and taught Master of Finance program in the Open University of Hong Kong. He is also a columnist writer for Eduplus magazine (Singtao Newspaper Group).

Apart from teaching, Ted is the Chairman of Fullness Christian Social Enterprise Ltd, aiming to provide vocational training for youth-at-risk in Hong Kong, which received the Outstanding Social Enterprise Award 2011 from the Hong Kong Government. He also served in the Continue Education Committee of the Hong Kong Society of Financial Analysts and received the **Decennary Service Award in 2011**.

Ted read his first degree in Hong Kong and subsequently a Master Degree in Singapore. He is a CFA charterholder since 2001.

STUDENT TESTIMONY

I followed Ted for **all three levels** of study, his **lectures were clear and precise**, . . . I could not finish them without your teaching. Really thanks for your teaching these years.

- Jason, PCCW

It was a great experience of taking your **CFA Level II & III course**. Your notes were **presented clearly and in good order** that helped me to understand the curriculum easily. Your patience and **prompt response to my questions** also impact me. Really appreciate for your help.

- Ivan Wong, UOB Group

. . . **All topics scored over 70%** . . . esp. the accounting and ethics sections (as a engineering background student). Thanks to **your excellent teaching and practical tips** in cracking questions . . . Thanks again!

- Jeff

. . . I have **passed my CFA Level II exam!** Instead of just memorising every stuff (like what I did in the past), . . . I had a **better understanding on the materials** after your teaching. Thank you once again".

- Christy, Bank of China

FREE SEMINAR

Our seminar provides detailed information about the CFA[®] program. You will have a chance to talk to our lecturer and seek advice from professional who had worked as an equity analyst before.

Free seminar contents:

1. Demo lecture
2. Exam & studying techniques
3. Change in curriculum over years
4. Weightings and focus of different subject areas
5. Career advice

. . . reserve a seat now at www.hkiti.com.hk

CFA Level I

Aug 6 - Nov 10, 2022 (In-person & Online class)

Learn & Practise (66 hours)



Body of Knowledge	Date		Time
Learn & Practice			
1. Quantitative Analysis	06-Aug-22	Sat	10am-1pm
2. Quantitative Analysis	09-Aug-22	Tue	7-10pm
3. Quantitative Analysis	13-Aug-22	Sat	10am-1pm
4. Financial Reporting & Analysis	03-Sep-22	Sat	10am-1pm
5. Financial Reporting & Analysis	06-Sep-22	Tue	7-10pm
6. Financial Reporting & Analysis	13-Sep-22	Tue	7-10pm
7. Financial Reporting & Analysis	17-Sep-22	Sat	10am-1pm
8. Financial Reporting & Analysis	20-Sep-22	Tue	7-10pm
9. Corporate Finance	24-Sep-22	Sat	10am-1pm
10. Corporate Finance + Economics	27-Sep-22	Tue	7-10pm
11. Economics	30-Sep-22	Fri	7-10pm
12. Economics	05-Oct-22	Wed	7-10pm
13. Portfolio Management	08-Oct-22	Sat	10am-1pm
14. Portfolio Management + Equity	11-Oct-22	Tue	7-10pm
15. Equity	15-Oct-22	Sat	10am-1pm
16. Fixed Income	18-Oct-22	Tue	7-10pm
17. Fixed Income	22-Oct-22	Sat	10am-1pm
18. Fixed Income + Derivatives	25-Oct-22	Tue	7-10pm
19. Derivatives + Alternative Investments	29-Oct-22	Sat	10am-1pm
20. Ethics & GIPS	1-Nov-22	Tue	7-10pm
Review & Mock			
21. Exam Review	08-Nov-22	Tue	7-10pm
22. Mock Exam	10-Nov-22	Thur	7-10pm

Notes: The lessons will be videotaped and online access will be made available for students until the respective exam windows ends. Mock exam will be conducted online. Course notes and practice problems are in hard-copy format.

Course Fee (incl. full set of course notes, practice problems & mock)
HKD9,800

Class Venue

2/F, Lee May Building, 788 Nathan Road, Prince Edward

Teaching medium

Cantonese (廣東話)

COURSE REGISTRATION FORM

✉ cs@hkity.com.hk

☎ 6283 7144



<https://forms.gle/RsPHagzagE1qmZPJA>

I would like to register for the following CFA® Program Exam Prep course:

- Level I class (commence on 6 Aug 2022)
 Level III class (commence on Jan 2022)
 Level II class (commence on 14 May 2022)

Student Information

- Referred by Friends Old student Google Yahoo

Full Name: Mr./Miss/Mrs./Ms. _____

Whatsapp: _____

Email (Gmail): _____

CFA Candidate no. (if any): _____

Company/ Affiliation: _____

Payment Methods

- Cheque (Payable to "Hong Kong Investment Training Institute Ltd.")
(Mailing address: Flat 3B, Shun Luen Factory Building, 86 To Kwa Wan Road, Tokwawan, Kowloon)

- FPS ID: 164723033/ e-banking / ATM Transfer
Hong Kong Investment Training Institute Ltd. (Hang Seng Bank No. 383-527330-883)
(Please enclose a copy/ screenshot of your payment record)

Entry Requirements

There is no specific entry requirements for the CFA® Program exam prep course, however, students have to ensure that they meet the requirements to take the corresponding exam. Please refer to www.cfainstitute.org for the up-to-date requirements.

Refund policies and other Rules and Regulations

1. All fee paid less application fee will be refunded if the course is withdrawn or not offered.
2. On premature cessation of the course, all fees and charges that have been collected in respect of any part of the course failing to be conducted on or after the date of the cessation will be refunded within 1 month of the premature cessation.
3. Enrolment will be recognised upon receipt of the payment before the commencement date of the course..
4. The course fee received is non-transferable.
5. When typhoon signal no. 8 or black rain signal is hoisted on the day of the course, the class will be automatically cancelled. A replacement class will be rearranged on another day.
6. Students are not allowed to record or videotaped the class in whatsoever circumstances.
7. **Copyright Notice:** The course notes, materials, audio and visual materials distributed through the class are subject to the law of Copyright in Hong Kong. Unauthorized copying, sharing or downloading are in breach of laws of Hong Kong and is a violation of Code of Ethics and Professional Standard of CFA Institute, no part of the shared materials may be reproduced, or transmitted or stored or downloaded in any form or by any means, without prior permission from Hong Kong Investment Training Institute Limited. Hong Kong Investment Training Institute Limited reserves the right to take legal action to anyone who violates it. Violation cases will be reported to CFA Institute directly and would result in removal of CFA candidacy or charter status.
8. The above rules and regulations are subject to change without prior notice.
9. We reserve the right to disqualify the enrolment eligibility of the student for any misbehaviour and violation to the above rules and regulations.

I hereby to certify that all the above information is accurate and I agree to the rules and regulations of the course laid down in the course brochure.

Signature: _____

Date: _____