

HKITI

香港投資培訓學院

We serve God by serving people

CFA Institute Prep Provider



CFA® Exam Prep Courses

2024 Level I, II & III *(Feb 2024 exam window)*

What is CFA Institute Prep Provider?

To be an official Prep Provider, Hong Kong Investment Training Institute Limited (HKITI) is required to submit all the course materials for approval every year, as of June 2023, **only 29 companies worldwide** received the title of **CFA Institute Prep Provider** to offer courses for all three levels. HKITI aims to equip students with comprehensive knowledge in finance based on official curriculum. 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)
- ✓ **Immediate Feedback** to students questions (rated by students at 4.85/5.0)
- ✓ **Over 17-year FULL-TIME** experienced lecturer
- ✓ 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 taught **All Three Levels** of the Program and with **over 15 years of full-time experience**. Before his teaching career, he had 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 is highly applauded for **his clarity in explaining difficult concepts** and has **taught over 1,000 CFA candidates**. He was the lecturer in Master of Finance program in the Open University of Hong Kong. He is also a columnist writer for Eduplus magazine (Singtao Newspaper Group).



Ted Kwan, CFA

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 **Decenary 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.

TESTIMONIES

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 career 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



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Practical Skills Module

<https://evolve.cfainstitute.org/practical-skills-modules.html>

- Start from 2024, candidate are required to finish ONE online self-learn video of about 10-15 hours.
- The contents are NOT examinable.
- Exam results will only be released when the candidate finish the learning
- Topics include: Python, Financial modelling, Analytical skills, AI & Machine learning.



Body of Knowledge

Level 3 – Portfolio Management

Strategic asset allocation
Institutional asset management

Level 2 – Asset Valuation

Equity, Alternatives, Derivatives, Fixed-incomes
Valuation models

Level 1 – Tools for Analysis

Economics, Statistics, Accounting

Exam Topics Weights

	Level I	Level II	Level III
Quantitative Method	6-9%	5-10%	--
Economics	6-9	5-10	--
Financial Statement Analysis	11-14	10-15	--
Corporate Issuers	6-9	5-10	--
Equity	11-14	10-15	10-15%
Fixed Incomes	11-14	10-15	15-20
Derivatives	5-8	5-10	5-10
Alternative Investments	7-10	5-10	5-10
Portfolio Management	8-12	10-15	35-40
Ethics & Standards	15-20	10-15	10-15
	100	100	100

Pass Rates

Level I 2023-05: **39%**
2023-08: **37%**

Level II 2023-05: **55%**
2023-08: **42%**

Level III 2022-08: **48%**
2023-02: **48%**



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CFA Level I (In-person & Online)

For 2024 Feb & May Exam

Learn, Practise & Review (66 hours)

Join our Free Seminar to enjoy \$1,000 discount

Body of Knowledge	Date		Time
Learn & Practice			
1. Quantitative Analysis	09-Nov-23	Thur	7-10pm
2. Quantitative Analysis	16-Nov-23	Thur	7-10pm
3. Quantitative Analysis	21-Nov-23	Tue	7-10pm
4. Financial Statement Analysis	23-Nov-23	Thur	7-10pm
5. Financial Statement Analysis	30-Nov-23	Thur	7-10pm
6. Financial Statement Analysis	05-Dec-23	Tue	7-10pm
7. Financial Statement Analysis	07-Dec-23	Thur	7-10pm
8. Financial Statement Analysis	14-Dec-23	Thur	7-10pm
9. Corporate Issuer	19-Dec-23	Tue	7-10pm
10. Corporate Issuer	21-Dec-23	Thur	7-10pm
11. Economics	28-Dec-23	Thur	7-10pm
12. Economics	02-Jan-24	Tue	7-10pm
13. Portfolio Management	04-Jan-24	Thur	7-10pm
14. Portfolio Management + Equity	11-Jan-24	Thur	7-10pm
15. Equity	16-Jan-24	Tue	7-10pm
16. Fixed Income	18-Jan-24	Thur	7-10pm
17. Fixed Income	25-Jan-24	Thur	7-10pm
18. Fixed Income + Derivatives	30-Jan-24	Tue	7-10pm
19. Derivatives + Alternative Investments	01-Feb-24	Thur	7-10pm
20. Ethics & GIPS	06-Feb-24	Tue	7-10pm
Review & Mock			
21. Exam Review	08-Feb-24	Thur	7-10pm
22. Mock Exam	09-Feb-24	Fri	7-10pm

Notes: Mock exam will be conducted online, course notes are provided in hard-copy format.

Course Fee

HKD10,800

Class Venue

Lee May Building, 788 Nathan Road, Prince Edward

Teaching medium

Cantonese (廣東話)

CFA Level III (In-person & Online)

For 2024 Feb & Aug Exam

Learn, Practise & Review (66 hours)

Join our Free Seminar to enjoy \$1,000 discount

Body of Knowledge	Date		Time
Learn & Practice			
1. Capital Market Expectation	11-Nov-23	Sat	9:30am-1:30pm
2. CME + Asset Allocation	14-Nov-23	Tue	7-10pm
3. Asset Allocation	18-Nov-23	Sat	9:30am-1:30pm
4. Derivatives + Currency Magt	25-Nov-23	Sat	9:30am-1:30pm
5. Private Wealth Management	28-Nov-23	Tue	7-10pm
6. Private Wealth Management	02-Dec-23	Sat	9:30am-1:30pm
7. Insitutional Investors	10-Dec-23	Sun	9:30am-1:30pm
8. Case Study	12-Dec-23	Tue	7-10pm
9. Case Study	16-Dec-23	Sat	9:30am-1:30pm
10. Fixed Income PM	23-Dec-23	Sat	9:30am-1:30pm
11. Fixed Income PM	30-Dec-23	Sat	9:30am-1:30pm
12. Equity Portfolio Management	06-Jan-24	Sat	9:30am-1:30pm
13. Alternative Investments PM	09-Jan-24	Tue	7-10pm
14. Alt Inv & Trading	13-Jan-24	Sat	9:30am-1:30pm
15. Performance Evaluation	20-Jan-24	Sat	9:30am-1:30pm
16. GIPS & Ethics	27-Jan-24	Sat	9:30am-1:30pm
Review & Mock			
21. Exam Review	03-Feb-24	Sat	9:30am-12:30pm
22. Mock Exam	04-Feb-24	Sun	9:30am-12:30pm

Notes: Mock exam will be conducted online, course notes are provided in hard-copy format.

Course Fee

HKD12,800

Class Venue

Lee May Building, 788 Nathan Road, Prince Edward

Teaching medium

Cantonese (廣東話)

CFA Level II Online Course

(For 2024 May, Aug & Nov Exam)

How to Prepare

Step 1 – Create the Study Plan

Each student will create a tailor-made study plan with our lecturer

Step 2 – Study with Online Video

Topics	Release date	Approx. duration
1. Quantitative Methods	4 Feb 2024	4 hours
2. Economics	11 Feb 2024	2 hours
3. Portfolio Management	18 Feb 2024	4 hours
4. Financial Statement Analysis	3 Mar 2024	8 hours
5. Corporate Issuers	10 Mar 2024	2 hours
6. Equity Investments	17 Mar 2024	6 hours
7. Alternative Investments	24 Mar 2024	2 hours
8. Fixed Income	7 Apr 2024	6 hours
9. Derivatives	14 Apr 2024	3 hours
10. Ethics	21 Apr 2024	2 hours
Mock Exam	28 Apr 2024	3 hours

Step 3 – Attend the Question Drilling Workshop (Face-to-face + Google Meet)

Topics	Date	Time
Drill 1 (Quants & Econ)	25 Feb 2024 (Sun)	10am-2pm
Drill 2 (Portfolio & FSA)	17 Mar 2024 (Sun)	10am-2pm
Drill 3 (Corp Issuers & Equity)	7 Apr 2024 (Sun)	10am-2pm
Drill 4 (Alt Inv & Fixed)	21 Apr 2024 (Sun)	10am-2pm
Drill 5 (Derivatives & Ethics)	28 Apr 2024 (Sun)	10am-2pm

Course Fee HKD6,880	Teaching Medium Cantonese (廣東話)	Class Venue Lee May Building, 788 Nathan Road, Prince Edward, Kowloon, HK
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COURSE REGISTRATION FORM

✉ cs@hkiti.com.hk

☎ 6283 7144



<https://forms.gle/RsPHaqzagF1qmZPJA>

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.