

HKITI

香港投資培訓學院

We serve God by serving people

CFA Institute Prep Provider



CFA® Exam Prep Courses 2025 Level I, II & III

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 Feb 2024, **only 30 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 18-year** 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.



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LECTURER

Ted specialises in investment, asset valuation and economics. He taught **All Three Levels** of the Program and with **over 18 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 1,500 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

WEBINAR

Our webinar 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.

Webinar 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
Private Wealth/ Markets

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 2024-02: **44%**
2024-05: **46%**

Level II 2024-05: **59%**

Level III 2024-02: **49%**



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CFA Level I Course

(For 2025 Feb, May, Aug & Nov Exam)

How to Prepare

Step 1 – Study Plan and Progress Review

Each student will have 2 individual meeting sessions (1 hour each) with our lecturer to discuss the progress of study.

Step 2 – Online Lecture Video (~52 hours)

Topics	Release date	Approx. duration
1. Quantitative Methods	Oct 2024	8 hours
2. Financial Statement Analysis	Oct 2024	11 hours
3. Corporate Issuers	Oct 2024	4 hours
4. Ecomics	Nov 2024	6 hours
5. Portfolio Management	Nov 2024	4 hours
6. Equity Investments	Dec 2024	5 hours
7. Fixed Income	Dec 2024	6 hours
8. Derivatives	Dec 2024	3 hours
9. Alternative Investments	Jan 2025	2 hours
10. Ethics & Professional Standards	Jan 2025	3 hours

Step 3 – Practice Questions Workshop (Google Meet)

Topics	Date (Tentative)	Time
Workshop 1 (Quants & FSA)	26 Oct 2024 (Sat)	10am-1pm
Workshop 2 (Corp Issuers & Econ)	16 Nov 2024 (Sat)	10am-1pm
Workshop 3 (Portfolio & Equity)	14 Dec 2024 (Sat)	10am-1pm
Workshop 4 (Fixed & Derivatives)	4 Jan 2025 (Sat)	10am-1pm
Workshop 5 (Alt Inv & Ethics)	25 Jan 2025 (Sat)	10am-1pm

Notes: Course notes will be provided in pdf format only

Course Fee HKD7,800	Teaching Medium Cantonese (廣東話)	Online Platform Google Classroom & Google Meet
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CFA Level II Course

(For 2025 May, Aug & Nov Exam)

How to Prepare

Step 1 – Study Plan and Progress Review

Each student will have 2 individual meeting sessions (1 hour each) with our lecturer to discuss the progress of study.

Step 2 – Online Lecture Video (~40 hours)

Topics	Release date	Approx. duration
1. Quantitative Methods	Jan 2025	6 hours
2. Economics	Feb 2025	2.5 hours
3. Portfolio Management	Feb 2025	4.5 hours
4. Financial Statement Analysis	Feb 2025	7 hours
5. Corporate Issuers	Mar 2025	3 hours
6. Equity Investments	Mar 2025	3 hours
7. Alternative Investments	Mar 2025	2.5 hours
8. Fixed Income	Apr 2025	4 hours
9. Derivatives	Apr 2025	3.5 hours
10. Ethics & Professional Standards	Apr 2025	2 hours

Step 3 – Practice Questions Workshop (Google Meet)

Topics	Date (Tentative)	Time
Workshop 1 (Quants & Econ)	1 Mar 2025 (Sat)	10am-1pm
Workshop 2 (Portfolio & FSA)	15 Mar 2025 (Sat)	10am-1pm
Workshop 3 (Corp Issuers & Equity)	29 Mar 2025 (Sat)	10am-1pm
Workshop 4 (Alt Inv & Fixed)	12 Apr 2025 (Sat)	10am-1pm
Workshop 5 (Derivatives & Ethics)	26 Apr 2025 (Sat)	10am-1pm

Notes: Course notes will be provided in pdf format only

Course Fee
HKD8,800

Teaching Medium
Cantonese (廣東話)

Online Platform
Google Classroom & Google Meet



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CFA Level III Course

(For 2025 Feb & Aug Exam)

How to Prepare

Step 1 – Study Plan and Progress Review

Each student will have 2 individual meeting sessions (1 hour each) with our lecturer to discuss the progress of study.

Step 2 – Online Lecture Video (~45 hours)

Core Topics		Release date	Approx. duration	
1. Capital Market Expectation		Oct 2024	3 hours	
2. Asset Allocation		Oct 2024	5 hours	
3. Derivatives and Risk Magt		Oct 2024	5 hours	
4. Equity, Fixed Income & Alternative Investment Portfolio Magt		Nov 2024	4 hours	
5. Private Wealth Magt		Nov 2024	2 hours	
6. Institutional Investors + Case		Nov 2024	2 hours	
7. Trading, Performance Evaluation		Nov 2024	4 hours	
8. Ethics & Professional Standards		Dec 2024	2 hours	
Pathways			Release date	Approx duration
Portfolio Magt	Private Mkt	Private Wealth		
Equity PM	Private Equity & Debt	Wealth Planning	Nov 2024	5 hours
Fixed Income PM	Special Situations	Advising the Wealthy	Dec 2024	5 hours
Trading Strategy	Real Estate & Infrastructure	Transferring Wealth	Jan 2024	5 hours



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CFA Level III Course (con't)

(For 2025 Feb & Aug Exam)

Step 3 – Practice Questions Workshop (Google Meet/ Video)

Core	Date	Time
Workshop 1 (CME + Asset Allocation)	3 Nov 2024 (Sun)	10am-1pm
Workshop 2 (Derivatives & Portfolio Magt)	10 Nov 2024 (Sun)	10am-1pm
Workshop 3 (PWM & Institutional)	1 Dec 2024 (Sun)	10am-1pm
Workshop 4 (Trading, Evaluation & Ethics)	8 Dec 2024 (Sun)	10am-1pm
Pathway	Date (tentative)	Time
Workshop for Portfolio Magt Pathways	12 Jan 2025 (Sun)	10am-1pm
Workshop for Private Wealth Magt Pathways	19 Jan 2025 (Sun)	10am-1pm
Workshop for Private Market Pathway	2 Feb 2025 (Sun)	10am-1pm

Notes: Course notes will be provided in pdf format only

Course Fee
HKD9,800

Teaching Medium
Cantonese (廣東話)

Online Platform
Google Classroom & Google Meet



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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.