

HKITI

CFA Institute Prep Provider

香港投資培訓學院

We serve God by serving people



CFA® Exam Prep Courses 2023 Level I, II & III *(May & Aug 2023 exam windows)*

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)
- ✓ **Immediate Feedback** to students questions (rated by students at 4.85/5.0)
- ✓ **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/ WEBINAR

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 (In-person & Online)

For 2023 Nov exam window

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

Learn, Practise & Review (66 hours)

| Body of Knowledge | Date | | Time |
|---|-----------|-----|----------|
| Learn & Practice | | | |
| 1. Quantitative Analysis | 27 Jul 23 | Thu | 7-10pm |
| 2. Quantitative Analysis | 03 Aug 23 | Thu | 7-10pm |
| 3. Quantitative Analysis | 24 Aug 23 | Thu | 7-10pm |
| 4. Financial Statement Analysis | 26 Aug 23 | Sat | 10am-1pm |
| 5. Financial Statement Analysis | 31 Aug 23 | Thu | 7-10pm |
| 6. Financial Statement Analysis | 2 Sep 23 | Sat | 10am-1pm |
| 7. Financial Statement Analysis | 7 Sep 23 | Thu | 7-10pm |
| 8. Financial Statement Analysis | 9 Sep 23 | Sat | 10am-1pm |
| 9. Corporate Issuer | 14 Sep 23 | Thu | 7-10pm |
| 10. Corporate Issuer | 16 Sep 23 | Sat | 10am-1pm |
| 11. Economics | 21 Sep 23 | Thu | 7-10pm |
| 12. Economics | 23 Sep 23 | Sat | 10am-1pm |
| 13. Portfolio Management | 5 Oct 23 | Thu | 7-10pm |
| 14. Portfolio Management + Equity | 7 Oct 23 | Sat | 10am-1pm |
| 15. Equity | 12 Oct 23 | Thu | 7-10pm |
| 16. Fixed Income | 14 Oct 23 | Sat | 10am-1pm |
| 17. Fixed Income | 19 Oct 23 | Thu | 7-10pm |
| 18. Fixed Income + Derivatives | 21 Oct 23 | Sat | 10am-1pm |
| 19. Derivatives + Alternative Investments | 26 Oct 23 | Thu | 7-10pm |
| 20. Ethics & GIPS | 28 Oct 23 | Sat | 10am-1pm |
| Review & Mock | | | |
| 21. Exam Review | 2 Nov 23 | Thu | 7-10pm |
| 22. Mock Exam | 4 Nov 23 | Sat | 10am-1pm |

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 are provided in hard-copy format.

Course Fee

HKD10,800

Class Venue

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

Teaching medium

Cantonese (廣東話)

CFA Level II (In-person & Online)

For 2023 May, Aug & Nov exam windows

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

Learn, Practise & Review (66 hours)

| Body of Knowledge | Date | | Time |
|--|-----------|-----|----------|
| Learn & Practice | | | |
| 1. Quantitative Methods | 3-Dec-22 | Sat | 10am-1pm |
| 2. Quantitative Methods | 10-Dec-22 | Sat | 10am-1pm |
| 3. Quantitative Methods | 17-Dec-22 | Sat | 10am-1pm |
| 4. Economics | 24-Dec-22 | Sat | 10am-1pm |
| 5. Economics | 7-Jan-23 | Sat | 10am-1pm |
| 6. Portfolio Management | 14-Jan-23 | Sat | 10am-1pm |
| 7. Portfolio Management | 21-Jan-23 | Sat | 10am-1pm |
| 8. Financial Statement Analysis | 28-Jan-23 | Sat | 10am-1pm |
| 9. Financial Statement Analysis | 4-Feb-23 | Sat | 10am-1pm |
| 10. Financial Statement Analysis | 11-Feb-23 | Sat | 10am-1pm |
| 11. Corporate Issuer | 18-Feb-23 | Sat | 10am-1pm |
| 12. Corporate Issuer | 25-Feb-23 | Sat | 10am-1pm |
| 13. Equity Valuation | 4-Mar-23 | Sat | 10am-1pm |
| 14. Equity Valuation | 11-Mar-23 | Sat | 10am-1pm |
| 15. Equity Valuation + Alternative Inv | 18-Mar-23 | Sat | 10am-1pm |
| 16. Fixed Income | 25-Mar-23 | Sat | 10am-1pm |
| 17. Fixed Income | 1-Apr-23 | Sat | 10am-1pm |
| 18. Derivatives | 15-Apr-23 | Sat | 10am-1pm |
| 19. Derivatives | 22-Apr-23 | Sat | 10am-1pm |
| 20. Ethics | 29-Apr-23 | Sat | 10am-1pm |
| Review & Mock | | | |
| 21. Exam Review | 6-May-23 | Sat | 10am-1pm |
| 22. Mock Exam | 13-May-23 | Sat | 10am-1pm |

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 are provided in hard-copy format.

Course Fee

HKD12,800

Class Venue

Room 607, 6/F, Lee May Building, 788 Nathan Road, Prince Edward

Teaching medium

Cantonese (廣東話)

CFA Level III (In-person & Online)

For 2023 Aug exam windows

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

Learn, Practise & Review (66 hours)

| Body of Knowledge | Date | | Time |
|--------------------------------------|-----------|-----|----------|
| Learn & Practice | | | |
| 1. Behavioral Finance | 11-Apr-23 | Tue | 7-10pm |
| 2. Behavioral Finance | 18-Apr-23 | Tue | 7-10pm |
| 3. Private Wealth Management | 25-Apr-23 | Tue | 7-10pm |
| 4. Private Wealth Management | 9-May-23 | Tue | 7-10pm |
| 5. Institutional Investors | 13-May-23 | Sat | 10am-1pm |
| 6. Case Study | 16-May-23 | Tue | 7-10pm |
| 7. Asset Allocation | 20-May-23 | Sat | 10am-1pm |
| 8. Asset Allocation | 27-May-23 | Sat | 10am-1pm |
| 9. Asset Allocation | 30-May-23 | Tue | 7-10pm |
| 10. Asset Allocation | 3-Jun-23 | Sat | 10am-1pm |
| 11. Fixed Income Portfolio | 10-Jun-23 | Sat | 10am-1pm |
| 12. Fixed Income Portfolio | 13-Jun-23 | Tue | 7-10pm |
| 13. Fixed Income Portfolio | 17-Jun-23 | Sat | 10am-1pm |
| 14. Equity Portfolio | 24-Jun-23 | Sat | 10am-1pm |
| 15. Equity Portfolio | 27-Jun-23 | Tue | 7-10pm |
| 16. Alternative Investments | 4-Jul-23 | Tue | 7-10pm |
| 17. Trading & Performance Evaluation | 11-Jul-23 | Tue | 7-10pm |
| 18. Trading & Performance Evaluation | 15-Jul-23 | Sat | 10am-1pm |
| 19. GIPS | 22-Jul-23 | Sat | 10am-1pm |
| 20. Ethics | 29-Jul-23 | Sat | 10am-1pm |
| Review & Mock | | | |
| 21. Exam Review | 5-Aug-23 | Sat | 10am-1pm |
| 22. Mock Exam | 12-Aug-23 | Sat | 10am-1pm |

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HKD12,800

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Teaching medium

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