



## 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<sup>®</sup> 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](http://www.hkiti.com.hk)

# CFA Level I (In-person & Online)

**For 2023 May & Aug exam window**

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

## Learn, Practise & Review (66 hours)

Body of Knowledge	Date		Time
<b>Learn &amp; Practice</b>			
1. Quantitative Analysis	29-Nov-22	Tue	7-10pm
2. Quantitative Analysis	6-Dec-22	Tue	7-10pm
3. Quantitative Analysis	13-Dec-22	Tue	7-10pm
4. Financial Statement Analysis	20-Dec-22	Tue	7-10pm
5. Financial Statement Analysis	3-Jan-23	Tue	7-10pm
6. Financial Statement Analysis	10-Jan-23	Tue	7-10pm
7. Financial Statement Analysis	17-Jan-23	Tue	7-10pm
8. Financial Statement Analysis	31-Jan-23	Tue	7-10pm
9. Corporate Issuer	7-Feb-23	Tue	7-10pm
10. Corporate Issuer	14-Feb-23	Tue	7-10pm
11. Economics	21-Feb-23	Tue	7-10pm
12. Economics	28-Feb-23	Tue	7-10pm
13. Portfolio Management	7-Mar-23	Tue	7-10pm
14. Portfolio Management + Equity	9-Mar-23	Thur	7-10pm
15. Equity	14-Mar-23	Tue	7-10pm
16. Fixed Income	21-Mar-23	Tue	7-10pm
17. Fixed Income	23-Mar-23	Thur	7-10pm
18. Fixed Income + Derivatives	28-Mar-23	Tue	7-10pm
19. Derivatives + Alternative Investments	4-Apr-23	Tue	7-10pm
20. Ethics & GIPS	6-Apr-23	Thur	7-10pm
<b>Review &amp; Mock</b>			
21. Exam Review	2-May-23	Tue	7-10pm
22. Mock Exam	4-May-23	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 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
<b>Learn &amp; Practice</b>			
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
<b>Review &amp; Mock</b>			
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

2/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
<b>Learn &amp; Practice</b>			
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
<b>Review &amp; Mock</b>			
21. Exam Review	5-Aug-23	Sat	10am-1pm
22. Mock Exam	12-Aug-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

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

### Teaching medium

Cantonese (廣東話)

# CFA Level I (In-person & Online)

**For 2023 Nov exam window**

**More details to be released in mid-2023**

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

Body of Knowledge	Date		Time
<b>Learn &amp; Practice</b>			
1. Quantitative Analysis	tbc	tbc	tbc
2. Quantitative Analysis	tbc	tbc	tbc
3. Quantitative Analysis	tbc	tbc	tbc
4. Financial Statement Analysis	tbc	tbc	tbc
5. Financial Statement Analysis	tbc	tbc	tbc
6. Financial Statement Analysis	tbc	tbc	tbc
7. Financial Statement Analysis	tbc	tbc	tbc
8. Financial Statement Analysis	tbc	tbc	tbc
9. Corporate Issuer	tbc	tbc	tbc
10. Corporate Issuer	tbc	tbc	tbc
11. Economics	tbc	tbc	tbc
12. Economics	tbc	tbc	tbc
13. Portfolio Management	tbc	tbc	tbc
14. Portfolio Management + Equity	tbc	tbc	tbc
15. Equity	tbc	tbc	tbc
16. Fixed Income	tbc	tbc	tbc
17. Fixed Income	tbc	tbc	tbc
18. Fixed Income + Derivatives	tbc	tbc	tbc
19. Derivatives + Alternative Investments	tbc	tbc	tbc
20. Ethics & GIPS	tbc	tbc	tbc
<b>Review &amp; Mock</b>			
21. Exam Review	tbc	tbc	tbc
22. Mock Exam	tbc	tbc	tbc

*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)

# COURSE REGISTRATION FORM



cs@hkiti.com.hk



6283 7144



<https://forms.gle/RsPHaqzagF1gmZPJA>

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

- Level I class (commence on 29 Nov 2022)  
 Level II class (commence on 3 Dec 2022)  
 Level III class (commence on 11 Apr 2023)

## 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

- 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](http://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: \_\_\_\_\_



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