

CFA[®]
PROGRAM
CHARTERED
FINANCIAL
ANALYST

Macau

LEADING GLOBAL PROVIDER

Over 25 years in offering all 3 levels of CFA[®] Program training in Hong Kong. Proven track record and experience over 50 class locations.

EXPERT TRAINERS

Satisfaction Rate of Trainer #: ≥90%

FLEXIBLE COURSE OPTIONS

FREE ONLINE ACCESS EXTENSION*

Max extend for 6 months with exam registration proof shown

COMPREHENSIVE LEARNING APPROACH

*Refers to page 9. *Refers to page 6.



Kaplan Financial - Financial Market HK



kaplanhk_fm



kaplan.com.hk/financial-markets

THE CFA® PROGRAM

CFA® Program
Chartered Financial Analyst

Kaplan Financial (HK) Limited is a member of the CFA Institute Approved Prep Provider Program. CFA® Program makes global standard for professionals in the financial sector, from which they gain investment knowledge and ethical principles. Earning a CFA® Charter you are one step ahead of becoming a financial professional.

Enter the CFA® Program

U.S. Bachelor Degree
(or equivalent)

OR

Final Year
Bachelor Degree Program

OR

4 Years
Full Time Professional Work*

*Not necessary investment related

Valid International Travel Passport
+
Meet the Professional Conduct Admission Criteria

BECOME THE CHARTERHOLDER

Pass 3 Levels of Exams



48 Months

Relevant Work Experience
accumulated before, during or after the exam



2 Sponsor Statements
for CFA Institute & society membership application



Become Regular Member of CFA Institute



Maintain Charterholder Status

CFA® PROGRAM OVERVIEW

- ▶ Administered by CFA Institute since 1962
- ▶ Generalist study and exam program for investment professionals
- ▶ Three exams based on a practice-based curriculum that changes annually to meet nature and complexity of the global investment profession
- ▶ Focus on the knowledge essential to the investment decision-making process
- ▶ Recognized as the “gold standard” in the industry

WHY DO THOUSANDS PURSUE THE CFA® CHARTER?

GOLD STANDARD WORLDWIDE

International standard for measuring competence and integrity; clients and colleagues regard charterholders with a presumption of expertise

CAREER ENHANCING

Represents a mark of quality, proof that you have mastered a rigorous curriculum and possessed a broad range of investment knowledge; a “passport” for entry to or advancement within the profession

ESSENTIAL KNOWLEDGE

Focuses on knowledge based on current industry practice, anticipated future trends and competencies essential to practice in the investment profession

GLOBAL NETWORK

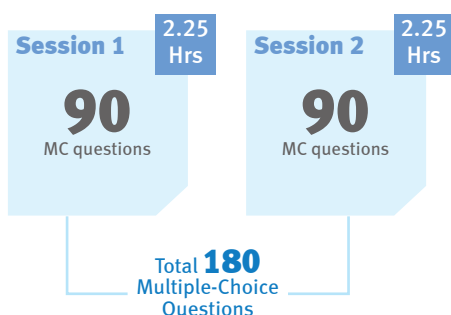
Instant access to a global network of financial professionals

CFA Institute does not endorse, promote, or warrant the accuracy or quality of the products or services offered by Kaplan Financial. CFA Institute, CFA® and the Chartered Financial Analyst® are trademarks owned by CFA Institute.

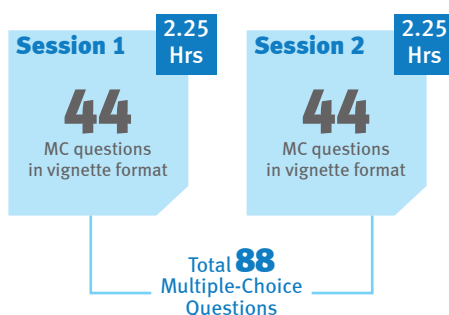
CFA Institute recommends minimum **300 hours** of study time for each level. Your time commitment is critical to success. Kaplan CFA® Exam Prep will **enhance your understanding of the materials** but your commitment to **out-of-classroom study** is essential.

EXAM STRUCTURE Computer-based

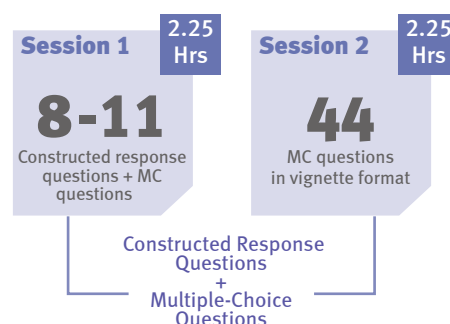
LEVEL I



LEVEL II



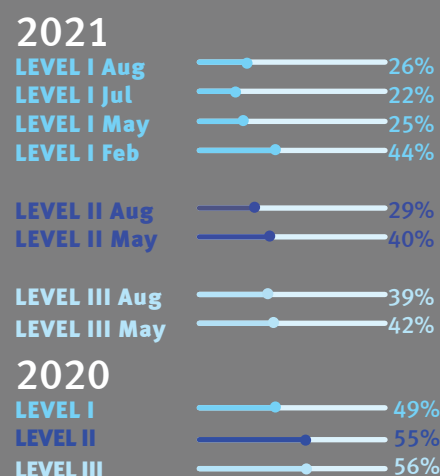
LEVEL III



Topic Area Weights

Exam Topic	LEVEL I	LEVEL II	LEVEL III
Ethical and Professional Standards	15-20%	10-15%	10-15%
Quantitative Methods	8-12%	5-10%	-
Economics	8-12%	5-10%	5-10%
Financial Reporting and Analysis	13-17%	10-15%	-
Corporate Finance	8-12%	5-10%	-
Equity Investments	10-12%	10-15%	10-15%
Fixed Income	10-12%	10-15%	15-20%
Derivatives	5-8%	5-10%	5-10%
Alternative Investments	5-8%	5-10%	5-10%
Portfolio Management and Wealth Planning	5-8%	10-15%	35-40%

CFA Exam Global PassRates



CFA EXAM COST & EXAM CYCLE

Exam Period	Exam Level	Exam Registration			Exam Dates
		Registration Window Opens	Early Registration Deadline	Registration Closes	
Feb	Level I	13/05/21	10/08/21	For latest info, please refer to CFA Institute by scanning the below QR code.	15 - 21/02/22
	Level II	13/05/21	10/08/21		22 - 26/02/22
May	Level I	20/07/21	01/11/21		17 - 23/05/22
	Level III	20/07/21	04/11/21		24 - 26/05/22
Aug	Level I	26/10/21	09/02/22		23 - 29/08/22
	Level II	26/10/21	09/02/22		30/08/22 - 03/09/22
	Level III	01/12/21	09/02/22		30/08/22 - 06/09/22
Nov	Level I	01/02/22	03/05/22		15 - 21/11/22
	Level II	01/02/22	03/05/22		22 - 26/11/22

Candidates are reminded to always refer to the examination body's official website for the most updated information. Information contained herein about exam registration information is correct at the time of brochure publication and is provided "as is", without any conditions, warranties, or other terms of any kind. Kaplan does not warrant the accuracy of the data which may be subject to changes.

For details, please refer to CFA Institute:
<https://www.cfainstitute.org/en/programs/cfa/exam>



THE CFA® PROGRAM

COURSE STRUCTURE

CANTONESE

ENGLISH



4 - 6 Months
before exam

EDUCATION

Learn new facts, concepts, processes, procedures, and principles

18-20 Sessions

54-60
Hrs



1 - 2 Months
before exam

REVISION

Retain and remediate new knowledge through application and practice

9 Sessions

27
Hrs

LEARNING OUTCOMES

Knowledge Building

- Cover all big-picture concept vital to understand CFA® Program curriculum and provide exam-related tips and tricks

Simulation and Practice

- Concentrate on exam taking strategies and techniques
- Intensive exercises drilling with full debriefs
- Additional review of most difficult and tricky concepts

LEARNING RESOURCES

Education Program Slide Pack

Practice Questions

- End-of-topic Q&A (level I only)

Free Schweser Essential Package

- FREE (Retail \$5,200)



Revision Mind Maps

- Summarize key concepts at a glance

Revision Q&A Book

- Over 800 exam-standard concept checkers

ONLINE ACCESS & SUPPORTING SERVICES

Online Pre-Course (enroll by Early Bird Deadline)

- Start early by watching approximate 9 hours of online instruction on fundamental concepts

Online Progress Test

- 6 tests (Level I), 4 tests (Level II & III) scheduled at key milestones
- Extra questions to consolidate knowledge

Online Education/Online Revision

- Captured from live Education Program & Revision Course
- Access the same quality teaching (trainer's audio, annotations and visuals) as students do in live lectures, except swap class service
- Tap into trainer support via email



2 - 4 Weeks
before exam

MOCK

Evaluate retention and application of new knowledge

Mock Exam

4.5
Hrs

Review

3
Hrs

Performance Measure

- Practice the skills and knowledge required in real exam
- Trainer's post-mock debrief

Exam-standard Mock Exam Questions

Personalized Performance Reports

- Evaluate your performance, identify areas for improvement and priorities

Graded Answer Sheet

- Including Essay Questions (Level III Only)



**Unlimited
Access**



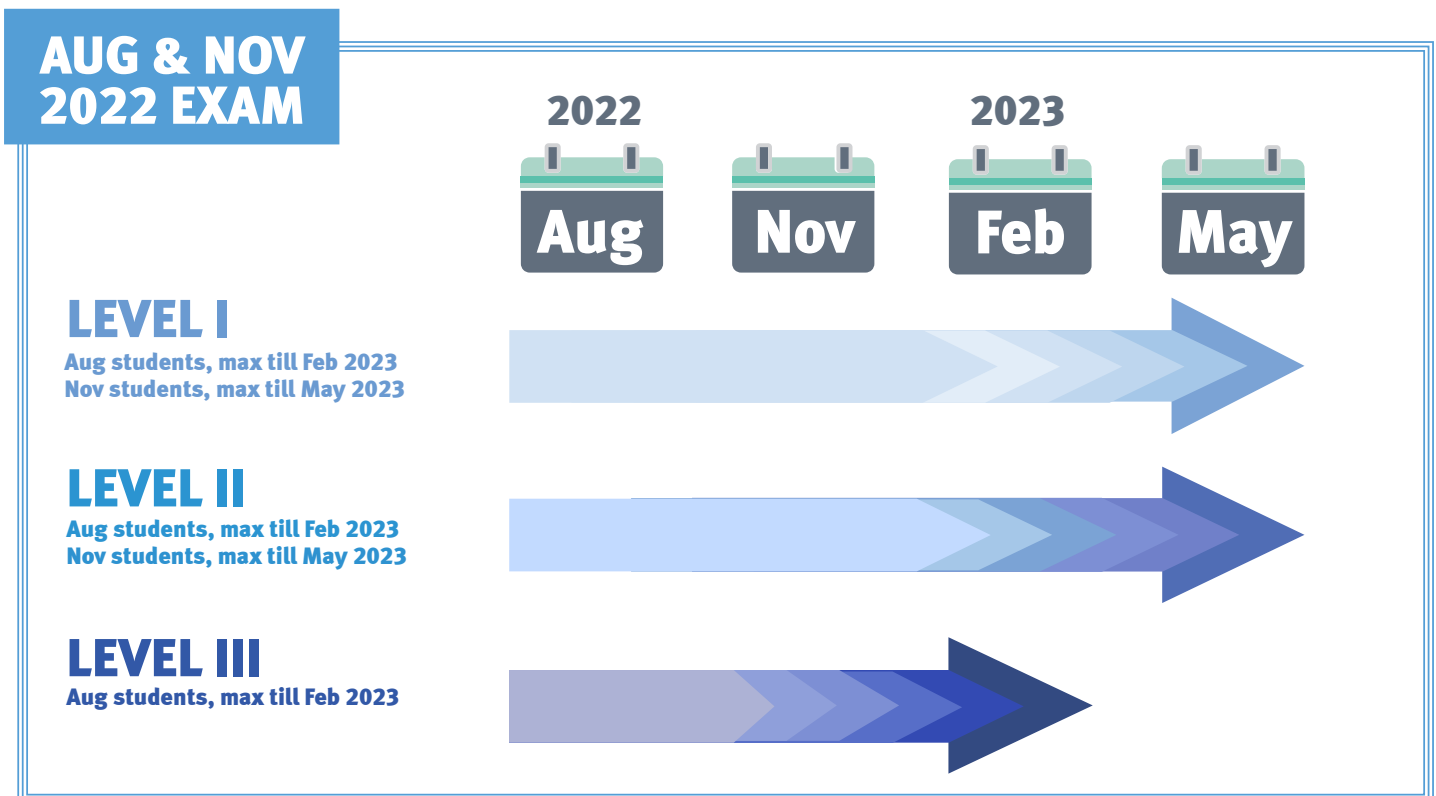
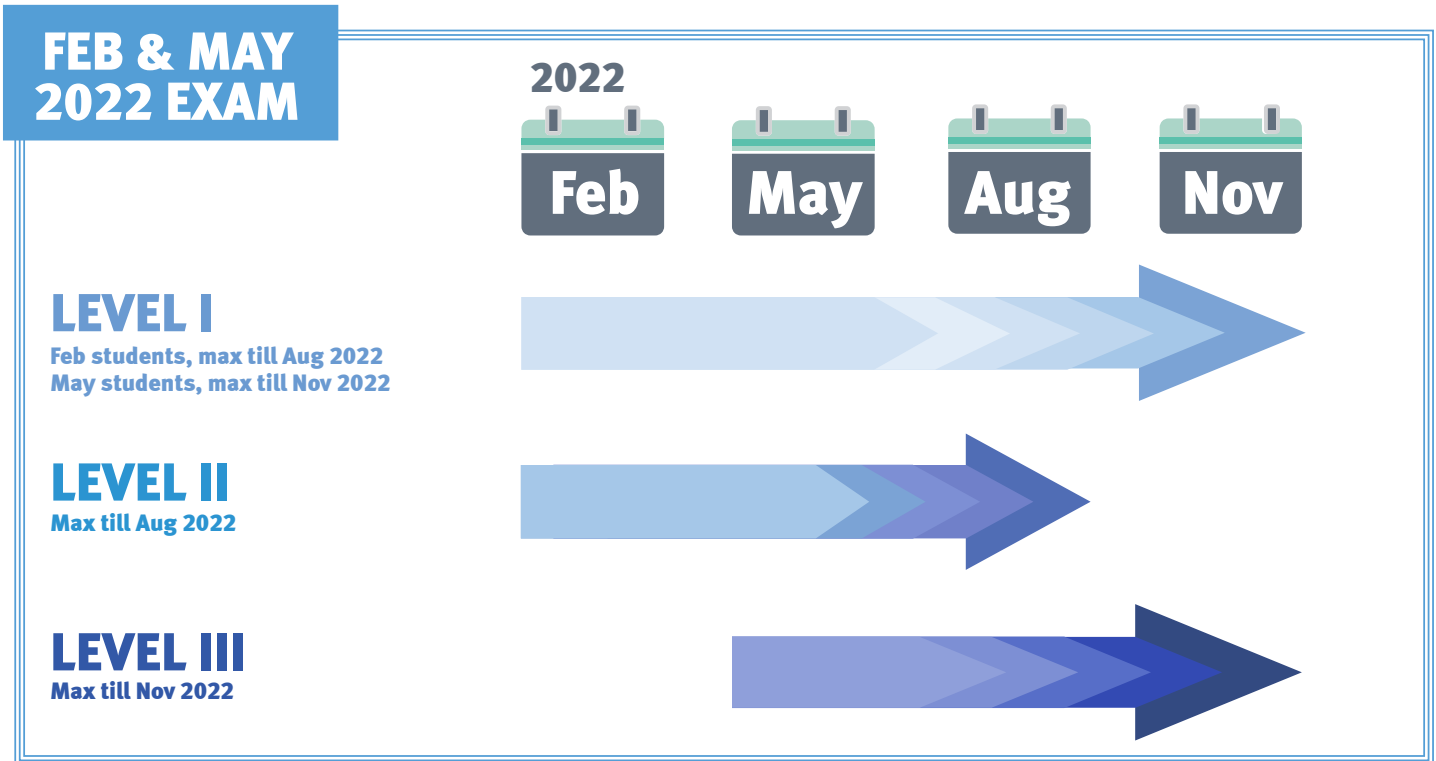
Prep at your own pace anytime anywhere

System Requirement
Visit: bit.ly/3hNI4b1

THE CFA® PROGRAM

FREE ONLINE ACCESS EXTENSION*

(same level, max extend for 6 months with registration proof shown)



* Refer to Kaplan HK's E-Learning Platform, not Schweser Portal.

- Online access will be extended to your new exam date as shown in the exam registration proof (max extend for 6 months) and referring to 2022 curriculum. Extension can only be applied once.
- Only applicable to Education and Revision phase, and only applicable to the program that you enrolled in.
- Alteration of trainer/language will **NOT** be allowed.
- New set of Schweser Essential Package will **NOT** be provided. You may purchase the updated Schweser materials at the applicable fees.
- New set of Kaplan class materials will **NOT** be provided.
- For Aug & Nov 2022 students who are extending the online access to Feb/May 2023:
 - » You may add \$4,900 to get the 2023 online access (only for enrolled program with the same language). 2023 Kaplan course slide pack (print) will be included.

WHAT OUR STUDENTS SAY

“

*I found that Kaplan's prep course for the CFA® program is incredibly helpful for a number of reasons. Most importantly, we had a great teacher - **engaging, enthusiastic, helpful, and highly exam-focused**.*

*I'm also grateful for his detailed, **step-by-step approaches** in teaching us how to answer exam questions. Also, the **catch-up videos** were very helpful for **reviewing concepts** and **catching things I had missed in class!***

Sarah Peterson
Level I & II Alumni

”

“

*I have passed CFA Level 1 exam with **total grade among the top 10% of global candidates**.*

*Sincere thanks to my trainer for his **great teaching** and to Kaplan for the extremely **excellent course design and course materials**. Without the help of Kaplan and my trainer, I might not be able to achieve this result at all.*

Esther Liu Yangzi
Level I Alumni

”

96%

**OF OUR STUDENTS SAID
KAPLAN'S CFA®
EXAM PREP IS USEFUL
(2018 - 2021 SURVEY RESULT)**

**HEAR WHAT OUR
STUDENTS SAY**



Upon successful enrollment (Education Program/Full Package) Start your preparation before class commencement

1

Online pre-course

Enroll Education Program/Full Package for our exclusive online pre-course features:

Level I:

Approximate 9 hours of online instruction on Fundamental Financial Reporting, Financial Maths, Basic Economics and BAII+ Calculator tips

Level II & III:

9 hours of instruction extracted from 2021 exam season

2

FREE Schweser Essential Package*

For product availability, please refer to Appendix V.
Remark: *Terms & conditions apply.

Enroll Education Program/Full Package and get your free set of 2022 Schweser Essential Package in advance

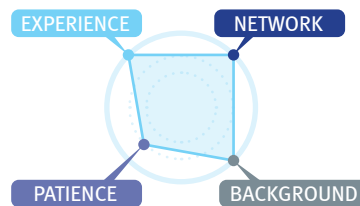


Trainers' Profile

Dr. Kyle Wong

PhD(Cornell), CFA, FRM

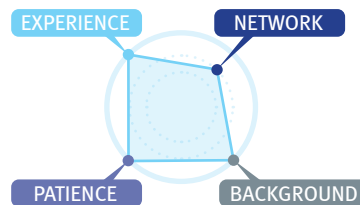
- Over 14 years of experience in teaching CFA Level I, II and III
 - Design, develop and deliver financial training programs to top financial institutions and MNCs
 - Expertise in investment tools, risk management, financial analysis, hedge fund, structured products, portfolio management and wealth management
 - Subject expert of CFA Level III essay questions
 - Trainer of the first CFA Level III IPS workshop in Hong Kong
 - Currently Director of Kaplan's Financial Markets Division
- COO of Avant Capital Management, a greater China value focused hedge fund
 - Columnist for i-Money Magazine
 - Joined from DBS, where he was VP of Complex Hybrid Products. Prior to that, he held numerous executive positions at Merrill Lynch, HSBC, RBC, Citi in Canada, Singapore and Hong Kong



Mr. Larry Yuen

MSc Risk Management Science (CUHK),
MSc (ECom&IComp) (HKU),
MFE (Lond), CFA, CAIA, FCA

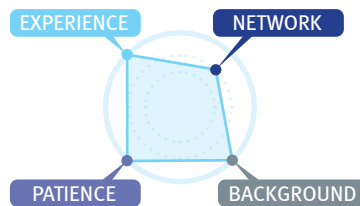
- All-round trainer with extensive experience in finance, risk management and accounting
 - Over 20 years of experience in the financial industry spanning across wealth management and capital markets
 - Held senior positions at Citi, Deutsche Bank, ABN Amro, ING and Schroder
 - Expertise in portfolio management and fund management
 - Experienced trainer in delivering master-level finance courses
- Numerous real-life examples to illustrate and solidify concepts



Mr. Jonathan Lau

BA Econ (Cambridge), CFA

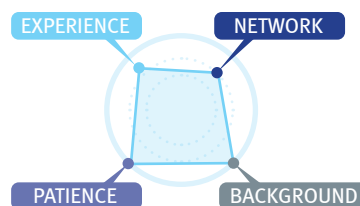
- Investment specialist with over 12 years of experience in multi-asset investments
- Was Head of Research for 7 years at Brooks Macdonald Asset Management based in London with over US\$13bn in assets under management
- Co-chaired the Asset Allocation Committee that oversaw the investment process, fund selection and macro research strategy
- Prior to that, held positions in Deutsche Bank's corporate team and IFG, a financial services company, where he managed pension funds
- Passionate trainer who will share tips from his experience in passing all three levels of the exam in one-go



Mr. J. Hui

BBA Fin & MIS (CUHK), CFA, CPA

- Award-winning equity research analyst, worked in a leading Europe-based brokerage firm and former sector research head of a China-based investment bank
- Investment specialist with over 10 years in the financial industry, spanning across equity/debt capital markets, and merger & acquisition
- Numerous real-life examples to illustrate and solidify concepts
- Known for his sharp insights into CFA exam techniques - both content and psychology



AVERAGE RATING OF TRAINERS#

#Jun 2017-2021 Statistics



FAQ

Q: Is your course suitable for me if I don't have solid background in Finance? Will it be difficult for me to catch up in class?

Our most complete 3-Phase learning strategy (Education + Revision + Mock Exam) for the CFA® Program, known as **Full Package** is the most comprehensive training in Hong Kong. We not only help you build core concepts but also take it further by enhancing exam techniques and rehearsing exam.

For students who do not have background in business nor strong financial knowledge, we offer **Free Online Pre-course** for those who enroll on or before early bird deadline. Approximate 9 hours of online instruction on fundamental concepts helps you build a solid foundation and acquire key skills required to ensure a smooth start.

We also recommend you to begin your CFA® Program journey with our **Free Resources**, including CFA® Fundamental eBook, Calculator Workshop etc. For details, please refer to <https://fmlanding.kaplan.com.hk/>.

Q: Will you help me register the exam?

You are responsible for registration of the CFA® exam. If you have not done so, you can register online at: www.cfainstitute.org/programs/cfa/register. Please beware of the exam registration deadline indicated on CFA Institute Official Website.

Q: How long should I prep the exam?

The CFA® exam is tough, CFA Institute recommends **minimum of 300 hours** of study time for each level. Instead of expending more energy and time trying to figure out the complexities of the curriculum, outsource it to a professional like Kaplan. So you can study more efficiently. Our most complete CFA® Program 3-Phase learning strategy (Education + Revision + Mock Exam) includes everything you need to maximize study effectiveness. The duration of our program takes 3 to 5 months to get you exam-ready.

Q: Which trainer is better?

Any educational program is only as good as the people who construct and deliver it. We have assembled the most effective, well-respected, and competent team of professional trainers to create and deliver Kaplan Exam Prep.

To learn more of their teaching styles and how trainers work through problems, you are welcome to attend our free seminars. For dates of upcoming seminars and to register, please visit: www.kaplan.com.hk/financial-markets/events.

Q: Any pass guarantee?

We understand that the qualification can be tough to pass, if you don't get the result you wanted, not all is lost. Therefore we offer free online access extension for you. Details please refer to Page 6.

Q: I think your program is quite expensive. May I know why I should choose Kaplan for preparing my CFA® exam?

We offer one of the **highest number of hours** of training program in Hong Kong. Designed around a 3-Phase learning strategy (Education + Revision + Mock), all our courses are guided by academic researches on the most effective study method to prepare for the exam. Many providers stop in the Education Phase. We take it further by enhancing exam techniques and rehearsing exam in the Revision Course and Mock Exam.

Q: I want to know more about the exam. Where can I find more information?

Please contact CFA Institute, contact details as below.

Hong Kong Office

23/F, Man Yee Building, 68 Des Voeux Road,
Central, Hong Kong
Tel: 2868 2700
24-hour Info: 8228 8820

Head Office in US

Email: info@cfainstitute.org
Tel: +1 (434) 951-5499
Fax: +1 (434) 951-5262
Website: www.cfainstitute.org
(login to submit inquiry at website)

Terms and Conditions

Terms and Conditions are subject to change without notice. Please review the full and most updated version from our website www.kaplan.com.hk/kfm periodically. All matters and disputes will be subject to the final decision of Kaplan. These Terms and Conditions set out your entire agreement with Kaplan Financial for the particular course and supersede all previous agreements or understandings made (verbally or in writing) in relation to the course.

Enrollment Policy

1. A completed enrollment form/order form must be accompanied by payment in full.
2. Prices are subject to change and we reserve the right to charge additional amounts to reflect any pricing changes taking effect before course commencement date(s).
3. Kaplan Financial reserves the right to cancel a course if enrollment is insufficient and/or make alterations regarding trainers, class locations, class schedules, topic sequence and time allocated to each topic should the circumstances so required.

Attendance Policy

4. Courses are not transferable between individuals. Under all circumstances, nobody except the registered students can participate in the registered class or gain access to student services. Kaplan Financial does not accept substitutes, in whole or in part, to obtain services, attend classes and sign on behalves.
5. Students are not allowed to swap or transfer class without Kaplan Financial's written or email approval.

Cancellation Policy

6. 50% course fee is refundable before activation of online account. No refund is allowed thereafter.
7. Cost of any course notes, Kaplan Schweser products and financial calculator are not refundable.
8. Cancellations will be subject to an administrative fee of \$300 per course.
9. Funds received but not utilized or refunded in accordance with these Terms and Conditions will be forfeited to Kaplan Financial.
10. Refund will only be arranged upon the receipt of all necessary documents and course fee paid will be refunded to the participant by cheque.
11. Any request for refund due to extenuating personal reasons will be considered and determined on a case by case basis, upon presentation of supporting documentation. The common extenuating reasons are illness, accident, pregnancy and bereavement.
12. The following reasons will not be grounds for refund: students' financial circumstances, failure to register for an exam, taking the exam in a later exam sitting, not pursuing the designation, change of work circumstances (i.e. job, location, working hours, obligations etc), difficulty level of course not suitable, dislike of trainer's presentation style.

Transfer Policy

13. Students must complete the course in the current exam sitting and are not allowed to transfer or defer any portion of the course and fees to the future exam sittings.

Re-issuance of Official Receipt

14. An administration fee of \$50 will be charged for each re-issuance of official receipt.

Online Access

15. Online Pre-course, videos and online progress tests are to be used for students' personal use and benefit. Shared use of online service is prohibited. Never share your password with anyone. Access will expire on the end of the month after the exam of your enrolled semester.
16. After the enrollment is completed, we will acknowledge your enrollment within 7 working days by (1) providing you the official receipt, (2) emailing you the login information. If you do not hear from us, please check with us at +852 2526 3686 or email to hkcf@kaplan.com.

Class Materials and Stationery

17. All class materials must be collected within the same course semester.

Copyright Policy

18. All class materials are for the sole use by registered students only. All materials, in whole or in part, may not be reproduced, shared, rent, copied or transmitted in any format or by any means, electronic or mechanical, including photocopying, recording, or by any information storage and retrieval system, without written permission from Kaplan Financial. The unauthorized duplication of class materials is a violation of global copyright laws.
19. Video or audio recording devices are prohibited under any circumstances.

eLearning

20. Enrollment to eLearning programmes will only be processed after Kaplan receives the applicants' signed acknowledgement of having satisfied Kaplan eLearners' system requirements. The validation aims to give you the opportunity to fully test the technology and ensure satisfactory viewing result before enrollment is processed. Your enrollment and payment will be put on hold until the validation is returned.
21. Course materials will be released in milestones. You are required to collect the course material including course slide pack and Schweser Essential Package (only if you have enrolled) in person or you are welcome to arrange your own courier services.

Kaplan offers delivery service at additional cost to a Hong Kong or Macau local address (preferably business address). You are responsible for assuring there is an authorized personnel to receive the materials at time of delivery. Kaplan will not re-ship course materials that are returned to us.

22. Kaplan will deliver to most countries, subject to additional shipping charges. You are responsible for any tax and custom duties that may apply. Please contact us for a quotation.
23. It is a limited license to use the content only between the times of access is granted and will expire on the end of the month after the exam of your enrolled semester. Kaplan bears no responsibility to extend the access period, regardless of students' actual exam date.

Kaplan Schweser Purchase

24. Sales of all products are final, non-refundable and non-returnable once order is placed and payment received.
25. Schweser study materials are protected by the laws of copyright of the United States and other countries throughout the world. Unauthorized creation, purchase, photocopy (i.e. pirated, illicit copies), scanning, use and transmitting of these materials, or portions thereof, in any form whatsoever, is a violation of the copyright law. Violators will be reported to the police and HK Customs and Excise Department where they may subject to criminal and civil liability.
26. The Schweser materials purchased are to be used for the purchaser's own personal use and benefit. Unauthorized commercial resale of Schweser materials is prohibited. Shared use of paper materials, and Online Access is prohibited. All products are non-transferable. Users must not share the username and password with anyone. Schweser reserves all its rights in the event of a violation of this policy, which may include suspension of purchaser's privileges and enforcement of Schweser's right under law and equity.
27. After the order is successfully processed, you will receive login information assigned by Kaplan Schweser within seven working days. It is a limited license to use the content only between the times of access is granted and the end of the month of the last exam semester in 2021 (for level I); the 15th of the month after the exam of your enrolled semester (for Level II & III). Kaplan bears no responsibility to extend the access period, regardless of purchasers actual exam date.
28. Schweser does not warrant that Online Access will be uninterrupted or error-free. Online access to www.schweser.com is provided on an "as is, as available" basis. You agree to meet the minimum system requirements set forth for Kaplan Schweser's electronic products.
29. Date of collection is subject to availability of different materials. Purchasers must present official receipt to collect the materials before the exam date of your enrolled semester.
30. Repeating discounts cannot be combined with any other offers, discounts or promotions. Candidates must present the required supporting documents at the time order is placed.

Feedback Mechanism

31. Kaplan Financial encourages constructive feedback on all aspects about the quality of teaching and learning. Throughout the course, if students are not satisfied about our course or services, students are advised to write to the Course Director with full descriptions and evidence. Kaplan Financial will take reasonable and prompt action to try to resolve your concerns. Complaints that are lacking in substance and not made in good faith will not be taken.
32. A course evaluation will be administered at the end of the course.

Ethics and Standards of Professional Conduct

33. Kaplan Financial and Schweser reserve the right to report any cases of misconduct, dishonesty, fraud or deceit to CFA Institute, other professional and government bodies. This can result in disciplinary action that may include a delay in or a permanent suspension of student's participation in Kaplan Financial; also may impact on your membership and certification with CFA Institute.
34. If students see any suspicious act of unauthorized recording or illegal attendance during the class, please alert our staff. Kaplan Financial reserves our right to report any case found to the Police and relevant professional bodies, including but not limited to CFA Institute.

Personal Data Protection

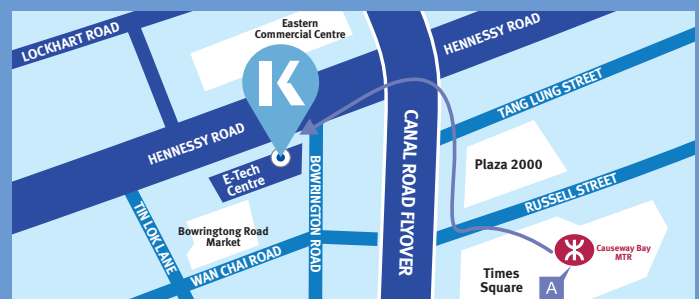
35. If you do not wish to receive our offers and updates, please email us at hkmarketing.kf@kaplan.com to unsubscribe.

Code of Conduct

36. It is the responsibility of every student to be aware of the Kaplan Hong Kong Code of Conduct's content as published in <http://www.kaplan.com.hk/code-of-conduct> and to abide by its provisions.

Kaplan Financial (HK) Limited

G/F to 3/F, E-Tech Centre, Nos 402-406 Hennessy Road, Wanchai
(Causeway Bay MTR Exit A)
Tel : 8522526 3686 Email : hkcf@kaplan.com
www.kaplan.com.hk/kfm



LEVEL I - COURSE SCHEDULE (FEB/MAY/AUG/NOV) Appendix I

EDUCATION PROGRAM

60 hours

20 sessions

PT = Online Progress Test Release Date		ONLINE	
		TRAINER ▶	
		LARRY YUEN CANTONESE	JONATHAN LAU ENGLISH
		DATE	DATE
1	Quantitative Methods	All videos are available now	All videos are available now
2	Quantitative Methods		
3	PT1 Quantitative Methods		
4	Financial Statement Analysis		
5	Financial Statement Analysis		
6	Financial Statement Analysis		
7	Financial Statement Analysis		
8	PT2 Financial Statement Analysis		
9	Portfolio Management		
10	Portfolio Management + Corporate Issuers		
11	Corporate Issuers		
12	Equity		
13	PT3 Equity		
14	Fixed Income		
15	Fixed Income		
16	Derivatives		
17	PT4 Derivatives + Alternative Investments		
18	Economics		
19	PT5 Economics		
20	PT6 Ethical and Professional Standards		

REVISION COURSE

27 hours

9 sessions

		ONLINE	
		TRAINER ▶	
		LARRY YUEN CANTONESE	JONATHAN LAU ENGLISH
		DATE	DATE
1	Quantitative Methods	All videos are available now	All videos are available now
2	Financial Statement Analysis		
3	Financial Statement Analysis		
4	Portfolio Management + Corporate Issuers		
5	Corporate Issuers + Alternative Investments		
6	Equity		
7	Fixed Income		
8	Derivative Investments + Economics		
9	Economics + Ethical and Professional Standards		

ONLINE MOCK

4.5 hours

EXAM WINDOW	DATE	DAY	TIME
Feb	29/01/22	Sat	10:00 - 12:15 & 12:45 - 15:00
May	07/05/22	Sat	
Aug	30/07/22	Sat	
Nov	05/11/22	Sat	

ONLINE MOCK EXAM REVIEW

3 hours

CLASS A CANTONESE				CLASS B ENGLISH			
TRAINER: LARRY YUEN				TRAINER: JONATHAN LAU			
EXAM WINDOW	DATE	DAY	TIME	EXAM WINDOW	DATE	DAY	TIME
Feb	10/02/22	Thu	19:00 - 22:00	Feb	09/02/22	Wed	19:00 - 22:00
May	11/05/22	Wed	19:00 - 22:00	May	Video will be available after 10/05/22		
Aug	03/08/22	Wed	19:00 - 22:00	Aug	04/08/22	Thu	19:00 - 22:00
Nov	09/11/22	Wed	19:00 - 22:00	Nov	Video will be available after 09/11/22		

LEVEL II - COURSE SCHEDULE (FEB/AUG/NOV)

Appendix II

EDUCATION PROGRAM

54 hours

18 sessions

PT =Online Progress Test Release Date		ONLINE	
		KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
TRAINER ▶		DATE	DATE
1	Ethical and Professional Standards + Financial Reporting and Analysis	Videos are available now	Videos are available now
2	Financial Statement Analysis		
3	PT1 Financial Statement Analysis		
4	Corporate Issuers		
5	Corporate Issuers		
6	Quantitative Methods		
7	Quantitative Methods		
8	Economics		
9	PT2 Economics + Portfolio Management		
10	Portfolio Management		
11	Equity		
12	Equity		
13	Equity + Alternative Investments		
14	PT3 Alternative Investments		
15	Fixed Income		
16	Fixed Income		
17	Derivatives		
18	PT4 Derivatives		

REVISION COURSE

27 hours

9 sessions

		ONLINE	
		KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
TRAINER ▶		DATE	DATE
1	Financial Statement Analysis	Videos will be released by phases from late Jan to mid Feb	Videos will be released by phases from late Jan to mid Feb
2	Financial Statement Analysis		
3	Corporate Issuers		
4	Quantitative Methods		
5	Equity		
6	Alternative Investments		
7	Fixed Income		
8	Derivatives		
9	Portfolio Management + Economics + Ethics		

ONLINE MOCK

4.5 hours

EXAM WINDOW	DATE	DAY	TIME
Feb	12/02/22	Sat	10:00 - 12:15
Aug	06/08/22	Sat	& 12:45 - 15:00
Nov	05/11/22	Sat	

ONLINE MOCK EXAM REVIEW

3 hours

CLASS A CANTONESE		TRAINER: KYLE WONG		CLASS B ENGLISH		TRAINER: JONATHAN LAU	
EXAM WINDOW	DATE	DAY	TIME	EXAM WINDOW	DATE	DAY	TIME
Feb	16/02/22	Wed	19:00 - 22:00	Feb	17/02/22	Thu	19:00 - 22:00
Aug	10/08/22	Wed	19:00 - 22:00	Aug	Video will be available after 10/08/22		
Nov	Video will be available after 06/11/22			Nov	Video will be available after 06/11/22		

LEVEL III - COURSE SCHEDULE (MAY/AUG)

Appendix III

EDUCATION PROGRAM

54 hours

18 sessions

PT = Online Progress Test Release Date		ONLINE	
		KYLE WONG CANTONESE	LARRY YUEN ENGLISH
TRAINER ▶		DATE	DATE
1	Behavioral Finance	Videos will be released by phases from late Jan to late Mar	Videos will be released by phases from late Jan to late Mar
2	Capital Market Expectations		
3	Capital Market Expectations		
4	PT1 Asset Allocation		
5	Derivatives		
6	Currency Management		
7	Fixed Income		
8	PT2 Fixed Income		
9	Equity		
10	Equity + Alternative Investments		
11	Alternative Investments		
12	Private Wealth Management		
13	PT3 Private Wealth Management		
14	Institutional Investors		
15	Trading		
16	Portfolio Performance Evaluation		
17	Investment Manager Selection and Case Studies		
18	PT4 Ethical and Professional Standards + GIPS		

REVISION COURSE

27 hours

9 sessions

		ONLINE	
		KYLE WONG CANTONESE	LARRY YUEN ENGLISH
TRAINER ▶		DATE	DATE
1	Behavioral Finance + Capital Market Expectation	Videos will be released by phases from mid Apr to mid May	Videos will be released by phases from mid Apr to mid May
2	Asset Allocation		
3	Derivatives + Currency Management		
4	Fixed Income		
5	Equity + Alternative Investments		
6	Private Wealth Management		
7	Private Wealth Management + Institutional Investors		
8	Portfolio Performance Evaluation + Investment Manager Selection		
9	Ethics and GIPS		

ONLINE MOCK

4.5 hours

EXAM WINDOW	DATE	DAY	TIME
May	07/05/22	Sat	10:00 - 12:15 & 12:45 - 15:00
Aug	13/08/22	Sat	

ONLINE MOCK EXAM REVIEW

3 hours

CLASS A CANTONESE TRAINER: KYLE WONG				CLASS B ENGLISH TRAINER: LARRY YUEN			
EXAM WINDOW	DATE	DAY	TIME	EXAM WINDOW	DATE	DAY	TIME
May	17/05/22	Tue	19:00 - 22:00	May	19/05/22	Thu	19:00 - 22:00
Aug	18/08/22	Thu	19:00 - 22:00	Aug	Video will be available after 18/08/22		

ONLINE LEARNING	DISCOUNTED PRICE		
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Online Full Package Online Education + Online Revision + Online Mock and Online Review + Schweser Essential Package (Print & Online)	\$12,750 (original price:\$15,000)	\$17,500 (original price:\$20,000)	\$18,900 (original price:\$21,000)
Online Education Program Only Online Education + Schweser Essential Package (Print & Online)	\$10,240 (original price:\$12,800)	\$12,900 (original price:\$15,000)	\$14,620 (original price:\$17,200)
Online Revision Course Only	\$5,460 (original price:\$6,500)	\$7,500 (original price:\$9,375)	\$8,640 (original price:\$10,800)
Online Mock & Online Review Only	\$1,300	\$1,400	\$1,500

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^Kaplan selective courses include Classroom Full Package, Classroom Education Program, Blended Full Package, Online Full Package and Online Education Program for CFA 2022 Feb, May, Aug & Nov exam.

STUDY PACKAGE		PremiumPlus™ Package	Premium Package	Essential Package
		HK\$11,700	HK\$7,400	HK\$5,200
ONLINE INSTRUCTION				
Live Online Weekly Class (US Time)*	Online	●		
OnDemand Class	Online		●	
Weekly Class Workbooks, Vol. 1 & 2	Print	●		
OnDemand Class Workbooks, Vol. 1 & 2	Online		●	
InstructorLink	Online	●	●	●
STUDY NOTES AND PRACTICE TOOLS				
SchweserNotes™ Vol. 1-5 - include Topic Quizzes	Print, eBook & Online	●	●	●
QuickSheet*	Print & eBook	●	●	●
SchweserNotes™ Videos	Online	●	●	●
Mock Exams (4 in 1)	Online	●	●	●
Checkpoint Exams	Online	●	●	●
SchweserPro™ Qbank	Online	●	●	●
Resource Library	Online	●	●	●
FINAL REVIEW				
Live Online Review Workshop (3-Day)	Online	●		
OnDemand Review Workshop	Online		●	
Review Workshop Workbook Set	Print (For PremiumPlus™ Package) Online (For Premium Package)	● Print	● Online	
Secret Sauce®*	Print, eBook & Online	●	●	
PASS GUARANTEE				
Schweser Commitment and PassProtection™	Print, eBook & Online	●	●	●

*eBook version is only available to review through VitalSource® for the SchweserNotes™, Secret Sauce®, and QuickSheet with limited access period. For more information regarding VitalSource®, please visit our FAQ page (https://www.schweser.com/faq?344-1_active=4)

*Class schedule: In US time, exact schedule and trainers (TBC)

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- 2 2023 exam registration notice for same level
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- 1 2022 exam fail notice for same level
- 2 2023 exam registration notice for same level
- 3 2023 Schweser Order form

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