

# STUDY THE 2024 CFA® PROGRAM!

**BECOME YOUR VISION: A CHARTERED FINANCIAL ANALYST® CHARTERHOLDER**



/// Study Options | Fees | Timetables ///

**SANDTON (RIVONIA) CAMPUS & ONLINE**



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Tel: 0861 131 137

# Classes for the CFA® Program Exam: At the Sandton (Rivonia) Campus

## CAMPUS ADDRESS

**CharterQuest House**  
1 Mellis Road, Mellis Court  
Rivonia. SANDTON  
Tel: +27 11 234 9223  
WhatsApp line: 060 453 6699  
Email: [enquiries@charterquest.co.za](mailto:enquiries@charterquest.co.za)



## Facilities:



**Accessible  
Location  
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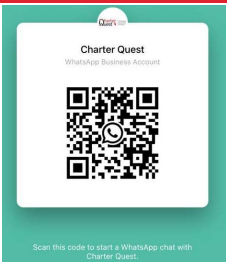
**Secure &  
Free Parking**



**Modern  
Classroom  
Facilities**



**Computer Lab  
with  
Internet connectivity**



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# What/Why CFA® Charter & How Can We Help?



**D. Valentine Nti**

Founding Chief Executive

"Administered by the US-based CFA Institute, the Chartered Financial Analyst® (CFA®) Program is a graduate-level and globally recognised program for investment specialists. The resulting professional credential/designation assures clients, employers, and colleagues that you as a charterholder, have mastered a rigorous finance and investment management curriculum; further that you are committed to the highest ethical standards in the profession. It is indeed, the most sought-after qualification by South African employers in the corporate finance and investments space.

## Program Structure & Syllabus:

The CFA® Program is structured into 3 challenging levels:

- Level I (knowledge and understanding of investment tools and techniques);
- Level II (application of investment tools and techniques to asset valuation)&
- Level III (synthesis and evaluation of investment tools and techniques in the context of portfolio management and wealth planning).

**The above 3 levels are** underpinned by a network of progressively challenging Learning Outcome Statements (LOSs), founded on 10 syllabus topic areas:

1. Ethics & Professional Standards;
2. Quantitative Methods;
3. Economics;
4. Financial Statement Analysis;
5. Corporate Finance;
6. Equity Investments;
7. Fixed Income;
8. Derivatives;
9. Alternative Investments; and
10. Portfolio Management and Wealth Planning.

## Exam Format & Schedules:

**All CFA® Exams are computer-based, under the following scheduling windows:**

For Level I: 4 times a year: February, May, August and November;

For Level II: 3 times a year: May August/September, and November 2024, and

For Level III: Twice a year; February and August/September.

**Level I exams** will be 4 hours and 30 minutes, split into 2.25 hour sessions. **Level II and III** will be 4 hours and 24 minutes, split into two equal sessions of 2 hours and 12 minutes, with an optional break in-between.

## Exemptions & Eligibility:

Irrespective of your prior qualification and/or experience, you cannot apply for exemption from any Level of the CFA® Program. To be eligible to start at Level I, you must either:

- Hold a bachelor's (or equivalent) degree, or
- Be in the final year of your bachelor's (or equivalent) degree, and/or
- Have four years of work experience (not necessarily investment related).

Please note: Although four years of work experience which is not necessarily-invested related will grant you eligibility, you will be required to submit three years of relevant work experience before being accorded the CFA Charter. This relevant experience you can gain before, during or after completing all the relevant CFA exams."

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# Study Options, Packages & Fees

Choose between 3 study packages (Tuition & Exam Preparation Package (TEPP) -Evenings & Weekends; Exam Preparation Only Package (EPOP) -Evenings & Weekends; or Livestream Interactive+ (Online)). You have the flexibility to attend our Full course (comprising of all 5 books/modules -at each level), and/or our exam preparation classes. For example, selecting TEPP will allow you to attend all 50 classes, covering all 5 books/modules (including 4 exam revision practice workshops); or, you can choose to only pay for and attend the scheduled 2-8 classes (including 4 revisions classes) that will be covering exam preparation only. The tables below provide further details of each study package, the indicative benefits and course fees.

## Indicative Course Benefits For All Levels (I, II & III)

TEPP  
Weekends/EveningsEPOP  
Weekends/EveningsLivestream  
Interactive+

Level I	R 23 500	R 15 000	R 17 000
Level II	R 23 500	R 15 000	R 17 000
Level III	R 23 500	R 15 000	R 17 000

### BENEFITS GRID

<u>1st Time Pass Guarantee</u>	✓	✗	✓
50 Tuition Classes (150 hours) {3 hours per session twice a week}	✓	✗	✓
2-8 classes (24 hours) {3 hours per session}	✓	✓	✓

### Study Materials Provided

- STUDY NOTES 6 e-Books: Clear, concise study notes (uWord - Formerly WILEY Notes) & examples that cover every Learning Outcome Statements (LOS), plus questions to check your understanding: <b>PLUS</b> detailed scheme of work.	✓	✗	✓ (e-Books)
- PRACTICE TOOLS 1: Question Bank accessible online with Over 1500 questions (to quiz yourself and build custom exams based on LOS).	✓	✓	✓
- CQ Lecture Videos & Slides accessible via your CQ students portal.	✓	✗	✓

### Mock Resources Provided:

- PRACTICE TOOLS 2: Multiple 3-9 Online Practice Mock Exams (to help you perform on exam day, depending on your performance tracking).	✓	✓	✓
- <b>BONUS:</b> Online access to over 1000 additional exam practice questions.	✓	✓	✓

### Additional Benefits

- PRACTICE TOOLS 3: <b>uWorld Premium Formula Sheet</b> (includes key formulas, definitions, and CFA Level 1 concepts) + <b>SmartCards and ReadyDeck Flashcards</b> (customizable digital flashcards).	✓	✓	✓
- The CFA® Program recommended financial calculator ( <b>BAILI Plus Professional -Texas Instruments</b> )	✓ (Level I Only)	✗	✗
- Instructor-Led Office Hours (Ask questions during an instructor's set office hours)	✓	✗	✓
- Student File - Customised CFA Student File	✓	✗	✗

Download Timetables Online on: [https://www.charterquest.co.za/time\\_table](https://www.charterquest.co.za/time_table)

\*Excluding registration and exam fees -this costs US\$940 - US\$1250, depending on how early you register (you can include this on your quotation or proforma invoice during online enrolment with CharterQuest).  
Get student funding from Capitec Education Finance & Standard Bank.





# BECOME YOUR VISION: A CHARTERED PROFESSIONAL



**Charter**  
**Quest**

Professional  
Education  
Institute



## WITH

- ACCA
- CIMA
- CFA® Charter
- SAICA
- ACT
- IIA
- UNISA

The Association of Chartered Certified Accountants  
The Chartered Institute of Management Accountants  
CFA Institute  
The South African Institute of Chartered Accountants  
The Association of Corporate Treasurers  
The Institute of Internal Auditors  
University of South Africa (CTA)

Charter Quest  
WhatsApp Chatbot



Scan this code to start a WhatsApp chat with  
Charter Quest



Professional  
Education  
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## HEAD OFFICE

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