Charter Quest | Professional Education Institute

STUDY THE 2027 CFA®PROGRAM

BECOME YOUR VISION: A CHARTERED FINANCIAL ANALYST® CHARTERHOLDER



1st Time Pass Guarantee

Study Options| Fees | Timetables

SANDTON (RIVONIA) | ONLINE

WhatsApp: +27 63 440 7269 | Email: enquiries@charterquest.co.za
Tel: 0861 131 137

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

CAMPUS ADDRESS

6Mellis Road,AvenuesNorth,
Birch House, Rivonia, Sandton, South Africa
Tel: +27 11 234 9223
Whats App line: +27 63 440 7269
Email:enquiries@charterquest.co.za



FACILITIES

- Accessible Location with FREE WIFI
- Secure & Free Parking
- Modern Classroom Facilities
- Computer Lab with Internet connectivity

Need Directions?
Scan Me

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E & OEs

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 recognized program for investment specialists The resulting professional credential/designation assures clients, employers, and colleagues that you as a charter-holder, 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 structured into 3 challenging levels:

•**Level I** (knowledge and understanding of investment tools and techniques);
•**Leve II** (application of investment tools and techniques to asset valuation)&
•**Level II** (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 2026, 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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Payment Terms : 20% deposit and balance payable over6months.

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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/Evenings	EPOP Weekends/Evenings	Livestream Interactive+
Level I	*R 32 750	R 17 500	R 26 750
Level II	R 32 750	R 17 500	R 26 750
Level III	R 32 750	R 17 500	R 26 750
BENEFITS GRID			
1st Time Pass Guarantee	√	x	√
50 Tuition Classes (150 hours) {3 hours per session twice a week}	√	x	√
Study Materials Provided			
- STUDYNOTES6e-Books:Clear,concisestudy notes (uWord - Formerly WILEY Notes) & examples that cover every LearningOutcomeStatements(LOS),plus questions to check your understanding: PLUS detailed scheme of work.	√(e-Books)	x	√(e-Books)
- PRACTICETOOLS 1: QuestionBankaccessibleonlinewithOver1500 questions (to quiz yourself and build custom exams based on LOS).	√	√	√
- CQ Lecture Videos & Slides accessible via your CQ students portal.	√	x	√
Mock Resources Provided:			
- PRACTICETOOLS2: Multiple3-9OnlinePracticeMockExams(to help you perform on exam day, depending on your performance tracking).	√	√	√
- BONUS: Online access to over 1000 additional exam practice questions.	√	√	√
Additional Benefits			
- PRACTICE TOOLS 3: **uWorld Premium Formula Sheet** (includes key formulas, definitions, and CFA Level 1 concepts) + **SmartCards and ReadyDeck Flashcards** (customizable digital flashcards).	√	√	√
- The CFA® Program recommended financial calculator (BAII Plus Professional -Texas Instruments)	√(Level I Only)	x	x
- Instructor-Led Office Hours (Ask questions during an instructor's set office hours)	√	x	√

Download Timetables Online on: https://www.charterquest.co.za/time_table

*Excluding exam fees -this costs US$1140 - US$1490, depending on how early you register (you can include this on your quotation or proforma invoice during online enrolment with CharterQuest).

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- ACCA — Association of Chartered Certified Accountants
- CIMA — Chartered Institute of Management Accountants
- CFA Charter — Chartered Financial Analyst (designation awarded by the CFA Institute).
- SAICA — South African Institute of Chartered Accountants
- ACT — Association of Corporate Treasurers
- IIA — Institute of Internal Auditors (global professional association for internal auditors).
- UNISA — University of South Africa



Scan to WhatsApp our Advisors!

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