

ΕΠΕΝΔΥΤΙΚΗ ΤΡΑΠΕΖΙΚΗ



CFA Society
Greece



ΕΛΛΗΝΙΚΟ ΤΡΑΠΕΖΙΚΟ ΙΝΣΤΙΤΟΥΤΟ
ΕΛΛΗΝΙΚΗ ΕΝΩΣΗ ΤΡΑΠΕΖΩΝ

ΕΠΙΠΕΔΟ III - Διοίκηση επιχειρήσεων επενδύσεων

CFA® Review Course 6th Series of CFA® Level III - Review Course

4 November 2023 – 20 January 2024

Exam Focus: February 2024

The Chartered Financial Analyst® (CFA®) Program is a graduate-level program that provides a strong foundation of the skills and knowledge needed to succeed in today's competitive world of investing and finance. It combines a broad-based curriculum of investment principles with professional conduct requirements. It is administered by CFA Institute (www.cfainstitute.org), the global not-for-profit organization of investment professionals.

Global Recognition

With a six-decade history of maintaining a rigorous focus on globally relevant investment knowledge, the CFA® Program is the most widely known and respected investment credential in the world. It is recognized by the global investment community as the highest educational and professional excellence standard.

Career Advantage

Employers recognize the CFA® charter as the definitive standard of competence, integrity, and dedication of investment professionals. The CFA® Program stands out at every stage of your career and equips you with the practical and fundamental knowledge you need for the investment profession. There is no better way to demonstrate your commitment and your ability to perform at a high level in the investment profession than by enrolling in and completing the CFA® Program.

Practical Skills

The CFA® Program curriculum focuses on the practical knowledge and current skills necessary in the global investment management profession. These skills can be immediately applied on the job and evolve each year to include new tools, ideas, frontier concepts, and lessons to reflect the dynamic and complex nature of the global investment profession.

Community

Earning the CFA® charter places you in the company of an elite group of over 188,000 respected investment professionals. Access to their collective expertise, networks, and resources is an invaluable asset.

CFA Society Greece
<http://www.cfa.gr>

Hellenic Banking Institute
<http://www.hba.gr/eti/>

Hellenic Capital Market Commission & Bank of Greece

The Hellenic Capital Market Commission and the Bank of Greece - regulators of investment services in Greece - recognize that CFA® charterholders are entitled to the highest certificate of "Securities & Market Analyst" (certificate level "δ"), without having to sit for the examinations whose curriculum is covered by the CFA Program.¹

The CFA® Program

The CFA® Program requires candidates to study for and pass three levels (I, II & III) of exams and meet other requirements, such as 4,000 hours of experience completed in a minimum of 36 months, in order to earn a CFA® charter. In general, each level of the CFA® Program requires a minimum of 300 hours of personal study, although time will vary based on familiarity with the material. To name a few of those who pursue the CFA® charter: Financial analysts, Securities & Investment managers, Securities & Derivatives traders, Portfolio managers, Financial planners, Relationship officers, Risk managers, Chief Financial Officers of corporations.

CFA Society Greece & Hellenic Banking Institute CFA® Review Course

CFA Society Greece, in partnership with the Hellenic Banking Institute of the Hellenic Bank Association, offers a CFA® Review Course for level III of the CFA® Study and Examination Program. This Review Course provides candidates with a structured, classroom-based approach to preparing for the exam. Candidates will also have the option to attend the classes virtually. It is designed to assist candidates in mastering the Candidate Body of Knowledge™ (CBOK™) that is attached.

Structured Classroom-based Instruction

Weekly classes provide structure for a disciplined pace of preparation. The focus is on the comprehension of the assigned materials in the Study Guides with an emphasis on the Learning Outcome Statements (LOS). Total class duration amounts to approximately 40 hours, as per the following table:

Class Day	November 2023	December 2023	January 2024
Saturday	4, 11, 18	2, 9, 16	6, 13, 20

* Saturday classes start at 09:00 a.m. and last for 6 hours in approximation.

Supplementary Study Materials Included

As an extra bonus at no additional charge, the *Schweser Essential™ Prep Package* (Retail Price: \$799) is provided to all candidates (available for pick-up as soon as shipment arrives), including:

- Schweser (Study) Notes™
- Schweser's QuickSheet™
- SchweserPro™ QBank (Online)
- Practice Exams, Vol. 1 & Vol. 2
- InstructorLink™ (partial access)
- Searchable FAQs & Exam-tips Blog
- Online Practice Exams

¹ CFA charterholders are exempted from all modules except from the "Capital market regulatory framework".

Top-notch Instructors

All sessions will be taught by multiple instructors who have been selected for their subject-matter expertise and excellence. All of them are holders of the CFA® charter and have a long track of professional and / or academic experience in the topics that they teach:

Mentoring from CFA charterholders

As an extra service at no additional charge, all candidates will have the necessary support and guidance from CFA charterholders who have recently excelled in the CFA Program exams who will act as mentors.

Administration

For registrations and any information requests please refer to the following contact details:

- ***Hellenic Banking Institute***
Mrs. M. Papoutsi tel. 210 33.86.429, email: mpapoutsi@hba.gr

CFA Society Greece
email: training@cfa.gr

Registration Student Pack

Upon registration to the Review Course, all candidates will receive the following:

- i) A detailed timetable of the classes referring to the dates, hours and instructors per topic.
- iii) An outline of the suggested readings and practice questions from the books.

Review Course Fees

Course Fees: **950 €**

The CFA® Review Course can be submitted to the relevant OAED program², LAEK 0,06%. For detailed information about our discount policies (special offerings for currently unemployed and students), please contact us.

Registration for the CFA® Review Course does NOT constitute enrollment in the CFA® Exam.

² For more information, you can visit the website: <http://www.oaed.gr/>

Rules – Disclaimers

The Review Course does not in any way aim to replace the intensive personal study that is required by the candidates, but works as supplementary towards their adequate preparation for the exam. Any study material that will be distributed is used to facilitate the learning process and does not constitute a substitute of the CFA® Program reading assignments provided by CFA Institute that comprise the core of study.

Registration in the CFA® Review Course is non-transferable. The Hellenic CFA Society and the Hellenic Banks Association retain the right to cancel the implementation of the Review Course provided that the number of registrations is not deemed sufficient as well as to modify the class timetable, if needed. Candidates are expected to adhere to the CFA Institute Code of Ethics, Standards of Professional Conduct, and Rules of Procedure for Proceedings Related to Professional Conduct and other conditions, requirements, procedures and policies set forth by the CFA Institute.

The availability of classroom-based lessons is subject to government and building safety regulations for Covid-19.

Review course is partially funded by CFA Institute.

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Αριθμός συμμετεχόντων: Μέχρι 25, κατά χρονική προτεραιότητα δηλώσεων συμμετοχής.

Τόπος διεξαγωγής: Ελληνικό Τραπεζικό Ινστιτούτο, <https://elearning.eti.gr/> & Μασσαλίας 1 10680, Αθήνα

Για **δηλώσεις συμμετοχής**, συμπληρωματικές πληροφορίες, **υποβολή προγράμματος στον ΟΑΕΔ** παρακαλούμε τηλεφωνήστε στο 210 33.86.429 (κα Παπουτσή).

Αρ. Σεμιναρίου 382

6th Series of CFA® Level-III Review Course

LIST OF TOPICS

Behavioral Finance, Individual Investors, and Institutional Investors

Capital Market Expectations

Asset Allocation

Fixed Income and Equity Portfolio Management

Alternative Investments, Risk Management, and the Application of Derivatives

Portfolio: Execution, Evaluation and Attribution, and Global Investment Performance Standards

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6th Series of CFA® Level III - Review Course

Η εκπαιδευτική διαδικασία συνιστά σχέση αμφίδρομης ουσιαστικής επικοινωνίας εκπαιδευτών και συμμετεχόντων. Η αποτελεσματικότητα της επικοινωνίας αυτής καθορίζεται σε μεγάλο βαθμό από το σχετικό με το σεμινάριο υπόβαθρο, τις ανάγκες και τις προσδοκίες των συμμετεχόντων.

Συγκεκριμένα, χαρακτηριστικά όπως η εργασιακή εμπειρία, το εκπαιδευτικό υπόβαθρο των συμμετεχόντων και τα ειδικότερα οφέλη που προσδοκούν αυτοί να αποκομίσουν από το εκπαιδευτικό πρόγραμμα συνιστούν καθοριστικούς παράγοντες, που πρέπει να συνεκτιμώνται για την αποτελεσματική προσαρμογή της μεθοδολογίας που θα χρησιμοποιήσουν οι εισηγητές.

Τα παρακάτω στοιχεία είναι απολύτως εμπιστευτικά και θα χρησιμοποιηθούν μόνο από το ΕΤΙ. Οι πληροφορίες αυτές θα βοηθήσουν τους εισηγητές να διαμορφώσουν το κατάλληλο εκπαιδευτικό «μείγμα» που θα μεγιστοποιήσει το δικό σας όφελος.

ΠΡΟΦΙΛ ΕΚΠΑΙΔΕΥΟΜΕΝΟΥ	
Όνοματεπώνυμο:	Τράπεζα/εταιρεία:
	Μονάδα:
Σημερινά επαγγελματικά καθήκοντα (σύντομη περιγραφή):	
Χρόνια προϋπηρεσίας:	
Προηγούμενες θέσεις εργασίας (εντός ή εκτός τραπεζικού χώρου):	
Σπουδές – ειδικότητες:	
Θέματα σχετικά με το πρόγραμμα που γνωρίζετε με οποιονδήποτε τρόπο (π.χ. εμπειρία, εκπαίδευση, αναγνωστικά ενδιαφέροντα):	
Εκπαιδευτικά προγράμματα που έχετε παρακολουθήσει για το ίδιο ή παρεμφερές θέμα:	
Θεματικές ενότητες στις οποίες θα επιθυμούσατε να δώσει μεγαλύτερη έμφαση ο εισηγητής:	

Πώς μάθατε για το πρόγραμμα προετοιμασίας CFA Society Greece – ETI

- ☐ Site EET – ETI (www.hba.gr/eti)
- ☐ Site CFA Society Greece (www.cfasociety.gr)
- ☐ Linked-in Group: [Greek CFA candidates](#)
- ☐ Από αναζήτηση στο διαδίκτυο (Search Engine)
- ☐ Από σύσταση γνωστού ή φίλου
- ☐ Από τον εργοδότη μου
- ☐ Από άλλη πηγή (παρακαλούμε προσδιορίστε): _____

Για την καλύτερη προετοιμασία της εκπαίδευσης, παρακαλούμε συμπληρώστε τις παρακάτω πληροφορίες:

1. E-mail εργασίας: _____
E-mail προσωπικό: _____
2. Είναι η πρώτη φορά που συμμετέχετε στις εξετάσεις CFA – Level III;
☐ Ναι ☐ Όχι (παρακαλούμε προσδιορίστε) _____
3. Αναφέρετε τους τίτλους σπουδών τριτοβάθμιας εκπαίδευσης που διαθέτετε:

**Παρακαλούμε στείλτε το συμπληρωμένο ερωτηματολόγιο μέχρι τις 15/10/2023
στο e-mail: mpapoutsi@hba.gr ή στο fax: 210-3646122.**

Ευχαριστούμε για τη συμβολή σας στην αρτιότερη προετοιμασία του προγράμματος.

Τομέας Επικοινωνίας ETI