

Student Club Resource Pack

Accelerate your Career in Finance





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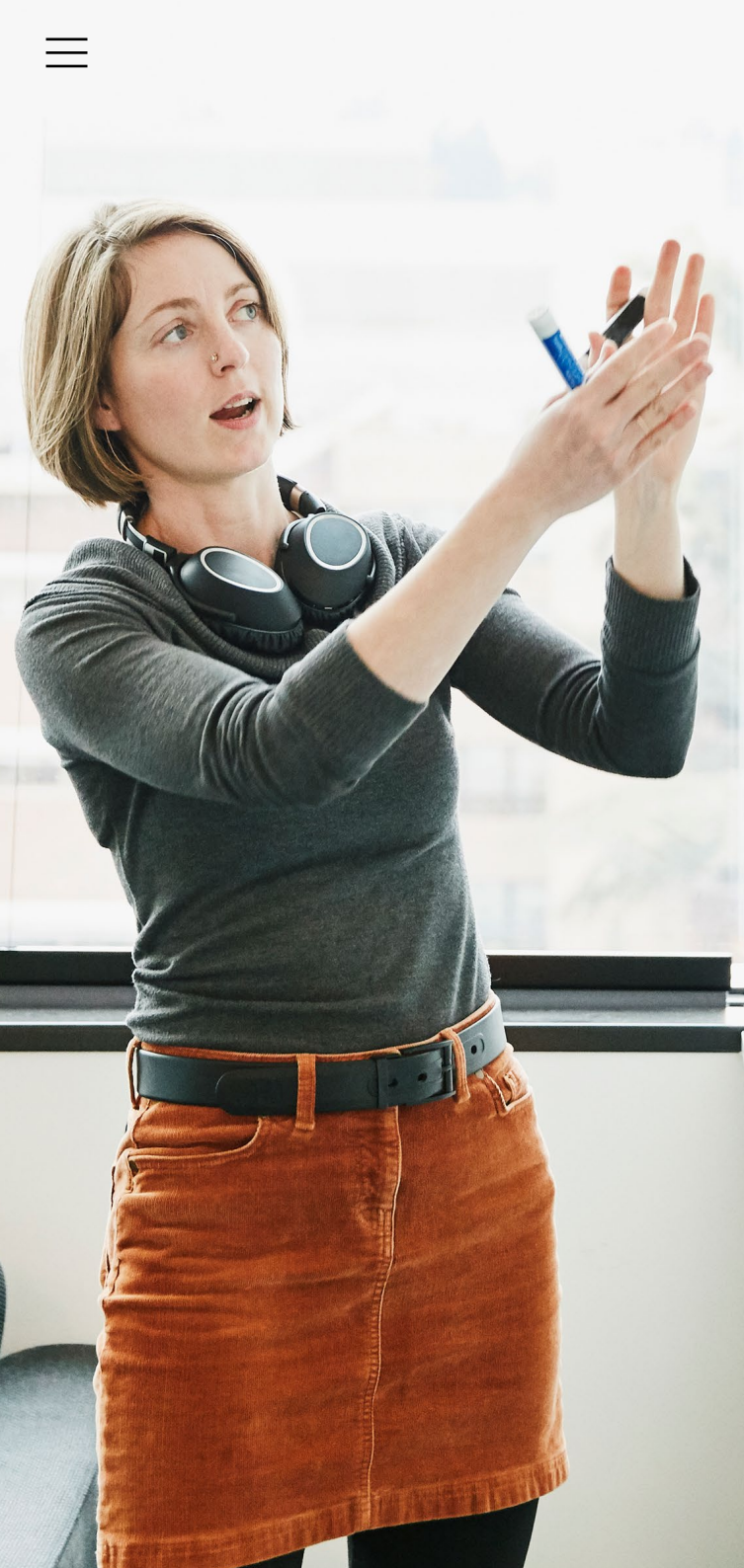
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SECTION 1

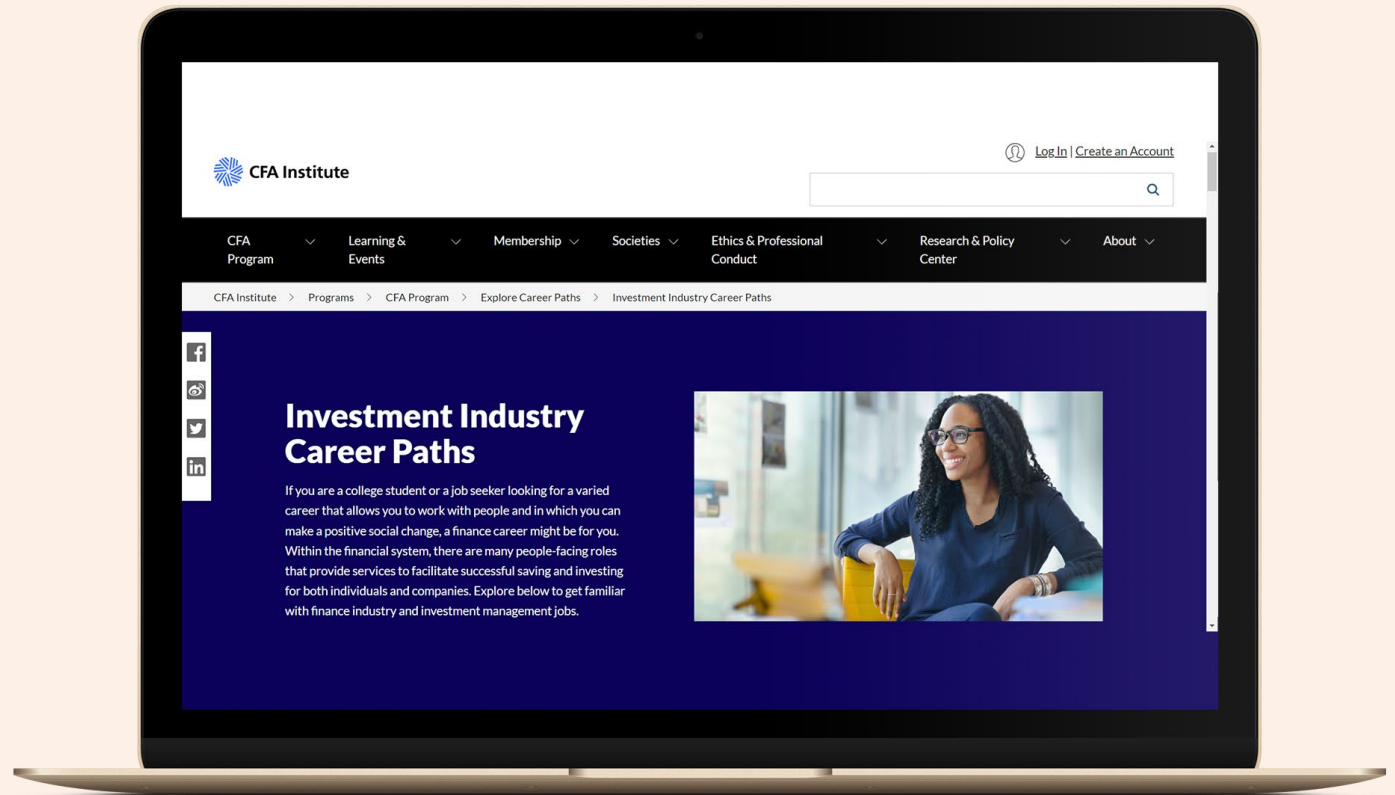
Career Resources

Investment Industry Career Paths

An overview of:

- ▶ The financial system
- ▶ Types of career opportunities, jobs, and responsibilities
- ▶ Buy-side vs. sell-side jobs
- ▶ How to break into finance from an unrelated field.

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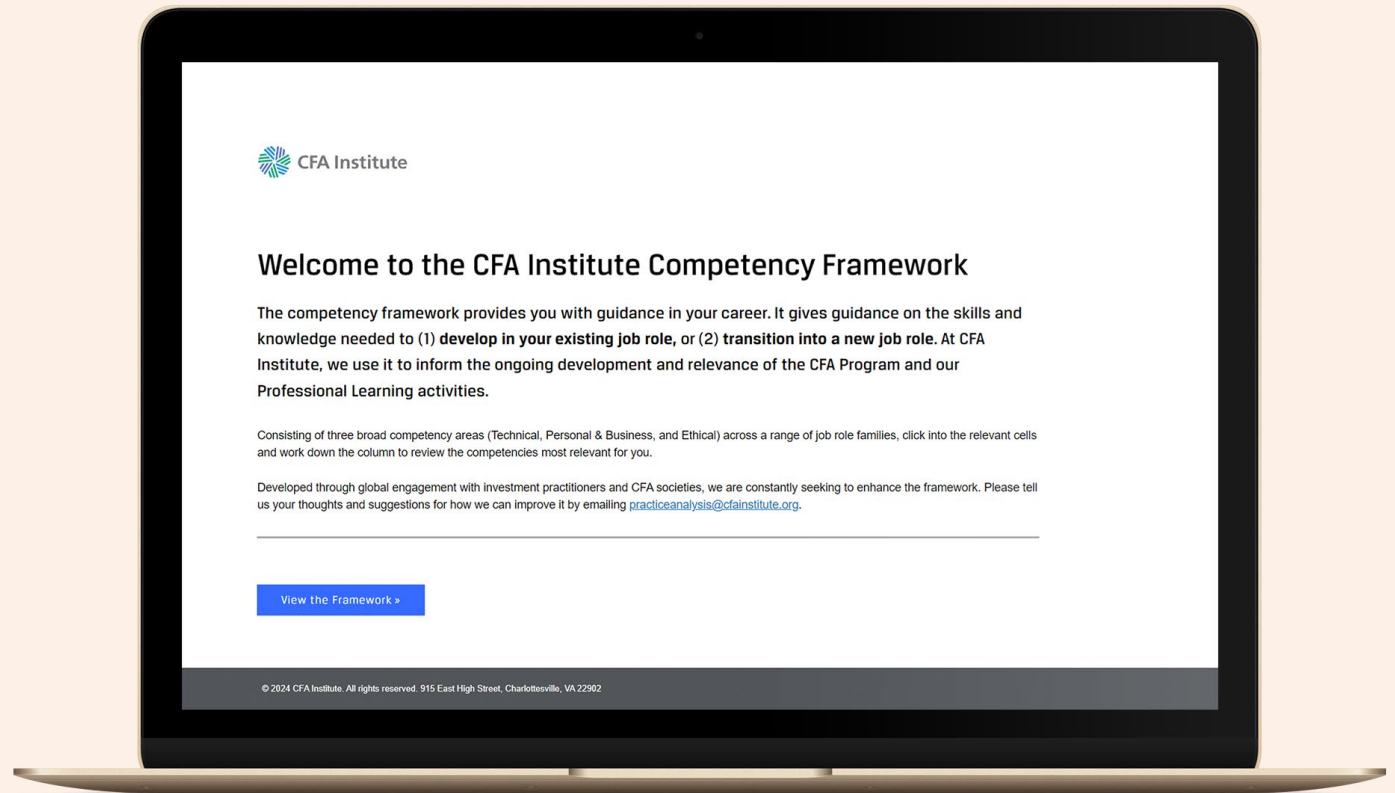
Competency Framework

Offers students guidance on their future career prospects. It gives guidance on the skills and knowledge needed to:

- ▶ Develop in an existing job role, or
- ▶ Transition into a new job role in the market.

This is a great way for students to better understand the technical knowledge, application, and interpersonal skills they will need in each job role.

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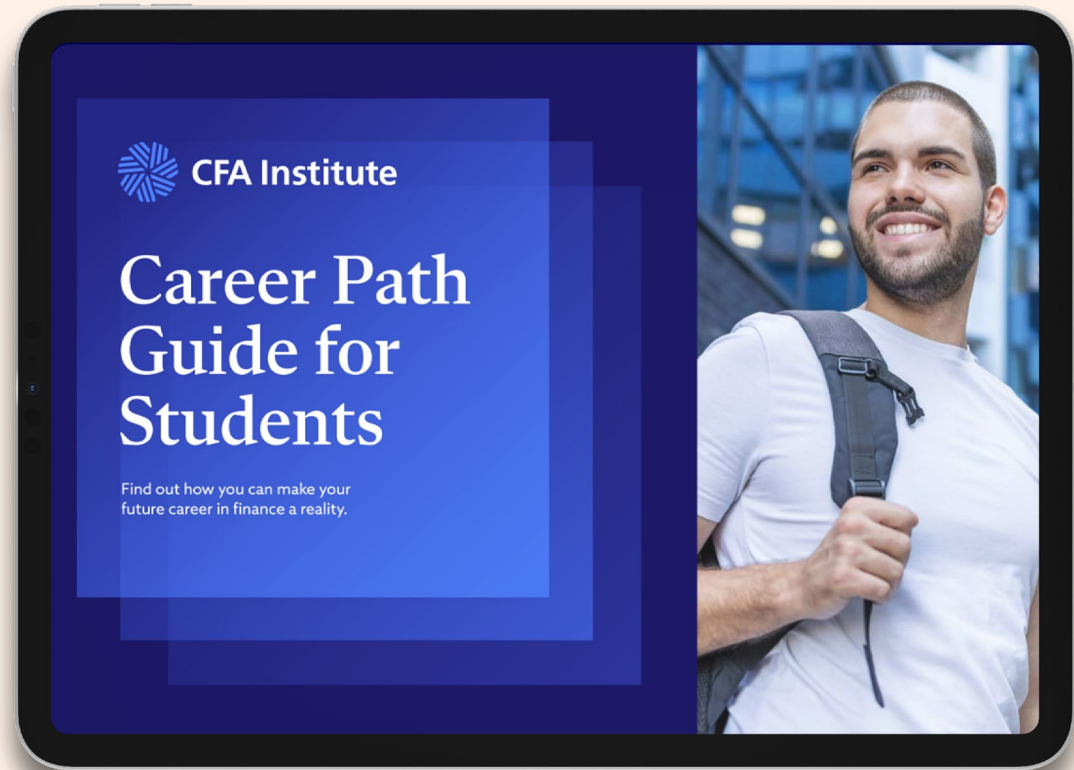
Career Planning for Students

University students or recent graduates interested in a career in finance have a lot of exciting options ahead.

But how do they know where to start? Which next steps to take, and when?

The finance industry is complex and highly competitive. This resource will help students launch a career in finance. Students can learn about the ways CFA Institute supports their learning and builds the practical skills required for finance professionals.

[Get access](#)



Career Conversations

Get Inspired by Our Testimonial Series

For real-life examples, you can explore the unique journeys and insights of finance professionals in our "Career Conversations" series at CFA Institute. This collection features authentic testimonials from seasoned experts and emerging talents alike, offering invaluable perspectives and inspiration for your own career path in finance. Dive into these stories to understand the real-world applications of finance principles and how they can shape your future success. Discover more and get inspired!

[Get access](#)



Career Conversations: Charting a Path to Portfolio Management

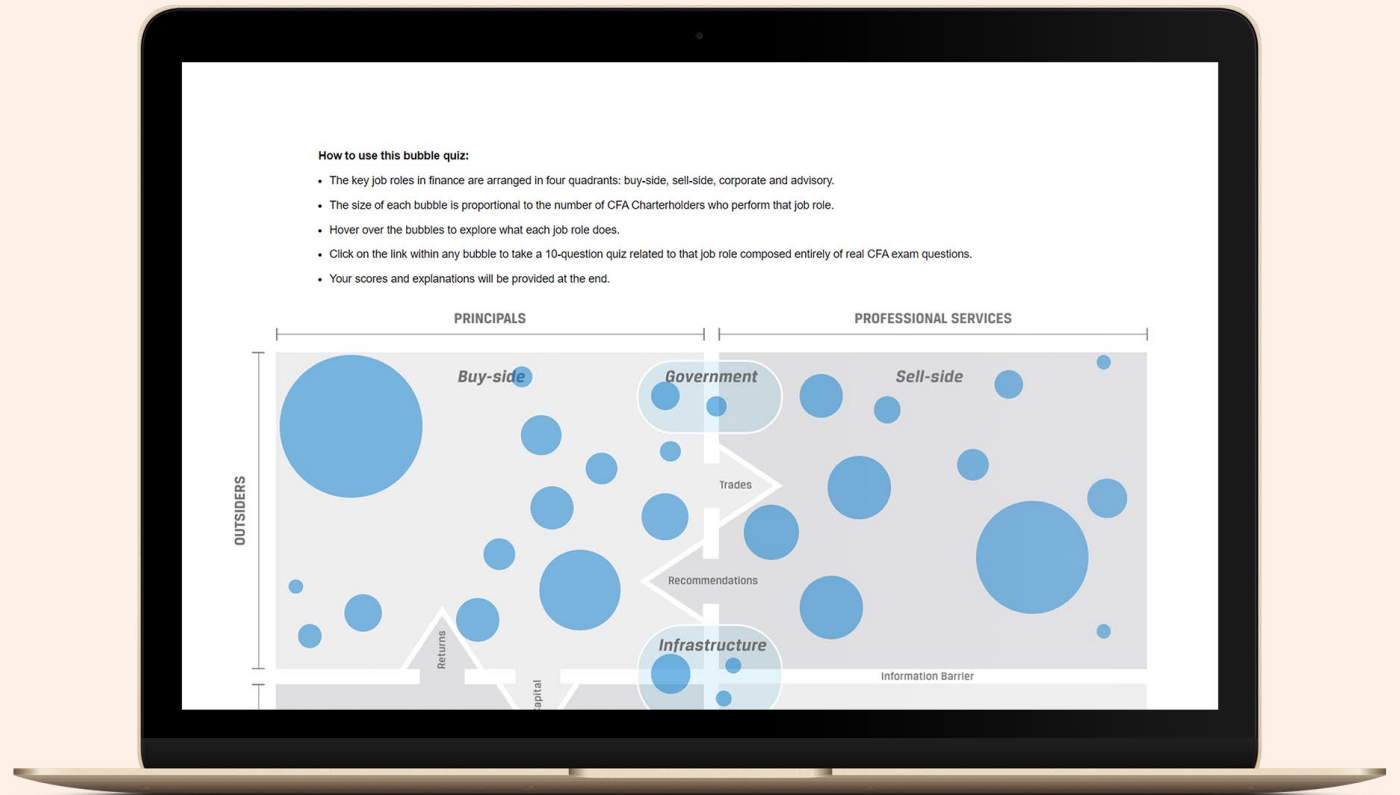
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Studying for the CFA charter is a rewarding but rigorous challenge. The key, according to Misbah Pervaiz, CFA, is to have strong support from family and friends who will help you get through the tough times. Watch Misbah's career story.

Bubble Quiz

The CFA Program is relevant to a multitude of job roles in finance. With our interactive graph, you can discover the breadth of roles served by the CFA Program and sample the sort of questions we ask about each job role in the CFA exam. The quiz uses real CFA exam questions to discover job roles.

[Get access](#)



‘Do you speak Finance?’ Quiz

Quiz designed to assess one’s familiarity with the words and phrases that are fundamental to the investment management industry.

Get access

“Do You Speak Finance” Quiz

Do you know these key words and phrases that are core to the investment management industry? Take this quiz and test yourself. You can download a handy glossary of terms at the end of the quiz.

1. When a country is more efficient in producing a good or a service than other countries—that is, it needs less resources to produce the good or service.
 - A. Absolute Advantage
 - B. Specific Advantage
 - C. Efficiency Advantage
 - D. Efficient Resources
2. An opportunity to make money by taking advantage of a price difference between two markets.
 - A. Asset Opportunity
 - B. Appreciation Opportunity
 - C. Arbitrage Opportunity
 - D. Allocation Opportunity
3. Type of alternative trading venue in which an electronic trading system matches buyers and sellers who are willing to trade at prices obtained from exchanges or other alternative trading venues but who are concerned about moving the price of the securities by submitting an order to an exchange.
 - A. Digital trading venue
 - B. Crossing network
 - C. Exchange trading network
 - D. Securities trading network
4. In economics, how the quantity demanded or supplied changes in response to small changes in a related factor, such as price, income, and the price of a substitute or complementary product.
 - A. Equilibrium
 - B. Diversity
 - C. Delta factor
 - D. Elasticity
5. A situation in which financial shocks spread from their place of origin to other locales; in essence, a faltering economy infects other healthier economies.
 - A. Financial contagion
 - B. Investment infection
 - C. Economic emergency



SECTION 2

Educational Content

Overview of Investment Foundations[®] Certificate

Build a better future. Start with the foundations.

The Investment Foundations[®] Certificate will provide learners with an overview of the essentials of finance, ethics, and investment roles, providing a clear understanding of the global investment industry including terminology and foundational concepts. This series of courses is designed for those aspiring to, or currently working within, support roles across the investment and finance industries.

[Get access](#)

CFA Institute

Investment Foundations[®] Certificate

Format
Self-paced online

Length to complete
60-90 hours

Price
USD280 member
USD350 non-member

Recognition format

- Digital badge
- Certificate for passing the exam

Participant profile
This series of courses is designed for those aspiring to, or currently working within, support roles across the investment and finance industries. It will benefit those in roles such as marketing, sales, project management, human resources, IT, and legal through better understanding of the industry, facilitating communication with colleagues, and advancing in one's career.

The goal of the Investment Foundations[®] Certificate is to provide an overview of the essentials of finance, ethics, and investment roles, providing a clear understanding of the global investment industry including terminology and foundational concepts. Individual learners develop competence by understanding industry functions, relationships, and their role and professional responsibilities, helping them see where they fit in the big picture. Successfully completing all 6 courses makes one eligible to sit for the final assessment which, when passed, confers an Investment Foundations Certificate and digital badge.

Learning outcomes

- Confidently and skillfully communicate and collaborate with investment management practitioners
- Develop critical thinking skills, ask the right questions, and innovate in optimizing financial outcomes for clients
- On-ramp to the investment profession as a CFA Institute Investment Foundations Certificate holder
- Learn ethical reasoning, understand job roles and responsibilities, and grasp the concepts, tools, and techniques used in the industry

Session topics	
Course 1	Industry Overview and Structure
Course 2	Types and Functioning of Markets
Course 3	Investment Instruments
Course 4	Investment Inputs and Tools
Course 5	Serving Client Needs
Course 6	Serving the Greater Good

Facilitation Pack

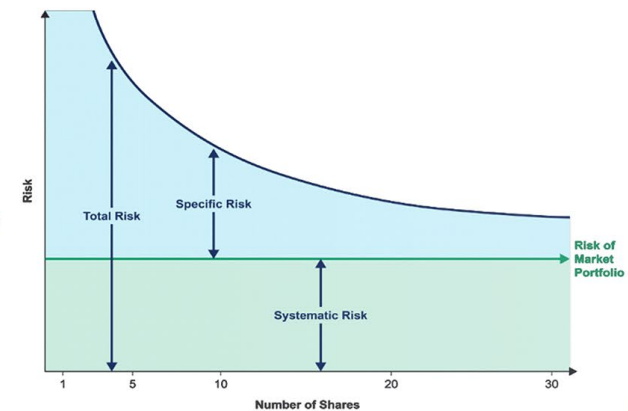
Includes facilitation slides, a word facilitation guide, end-of-module summaries, and an Investment Foundations® Certificate glossary.

In order to access these materials, each club will have to sign the licence agreement attached here and email it to emma.holyer@cfainstitute.org

Get access

■ ■ ■ Diversification

- A portfolio's return is the weighted average of the returns of the assets in the portfolio.
- If the portfolio's assets' returns are not perfectly correlated, the risk will be less than the weighted average of the assets' risk.



Investment Foundations[®] Certificate

How to support your clubs' activities

▶ **Discussion sessions**

Your Finance Society can use the big picture/topics/discussion questions from the slides to facilitate discussion for learners after they have completed a given CFA Institute Investment Foundations[®] Certificate module. This can help enhance and clarify understanding and ensure learners stay motivated and on track.

▶ **Facilitation sessions**

Your Finance Society can use the entire decks to teach learners the Investment Foundations[®] Certificate content before, alongside, or after the individual learners complete the content in the learning ecosystem.

▶ **Volunteering**

Offers chances for your members to host sessions, give back, share their knowledge, practice their presentation skills, and mentor others (formally or informally).

▶ **Members**

Increased society engagement from learning together. Creating and increasing strong connections for members. Members who take part will have a common understanding of the industry, structure, terminology, and functions, building stronger relationships and raising their professional competence.

CFA Program

Invest in your future with CFA Program

- ▶ Recognized by leading investment companies around the world as the 'gold standard' investment credential, the CFA Charter is the best possible route to career success and global opportunity.
- ▶ Acquiring the charter is known as one of the investment industry's biggest challenges: It starts with passing the three CFA Program exams. Successfully finishing the program prepares you to advocate for market transparency, fairness, and integrity.
- ▶ The CFA Program is a self-study, three-level exam that tests the fundamentals of investment tools, company valuation, portfolio management, and wealth planning while always putting ethics at the center.

Get access

Programs

CFA Institute provides aspiring and practicing investment professionals with the knowledge and skills needed to thrive in a highly competitive industry. The programs are designed to equip you with the expertise and real-world skills you need to advance your career.

Chartered Financial Analyst (CFA®)

Elevate competencies in advanced portfolio management, financial expertise, and technical skills by earning the esteemed Chartered Financial Analyst (CFA®) designation, one of the profession's highest distinctions.

Time required: 300+ hours

Early registration fee: USD950 per level

Standard registration fee: USD1,250 per level

The Certificate in Investment Performance Measurement (CIPM®)

Leverage the expertise of CFA Institute to deliver practice-based approaches and develop skills for effective investment performance evaluation and manager selection.

Time required: 155+ hours

Early registration fee: USD475 per level

Standard registration fee: USD675 per level

[Visit our website for more details](#)

CFA Institute Courses

Take a short course to upskill quickly!

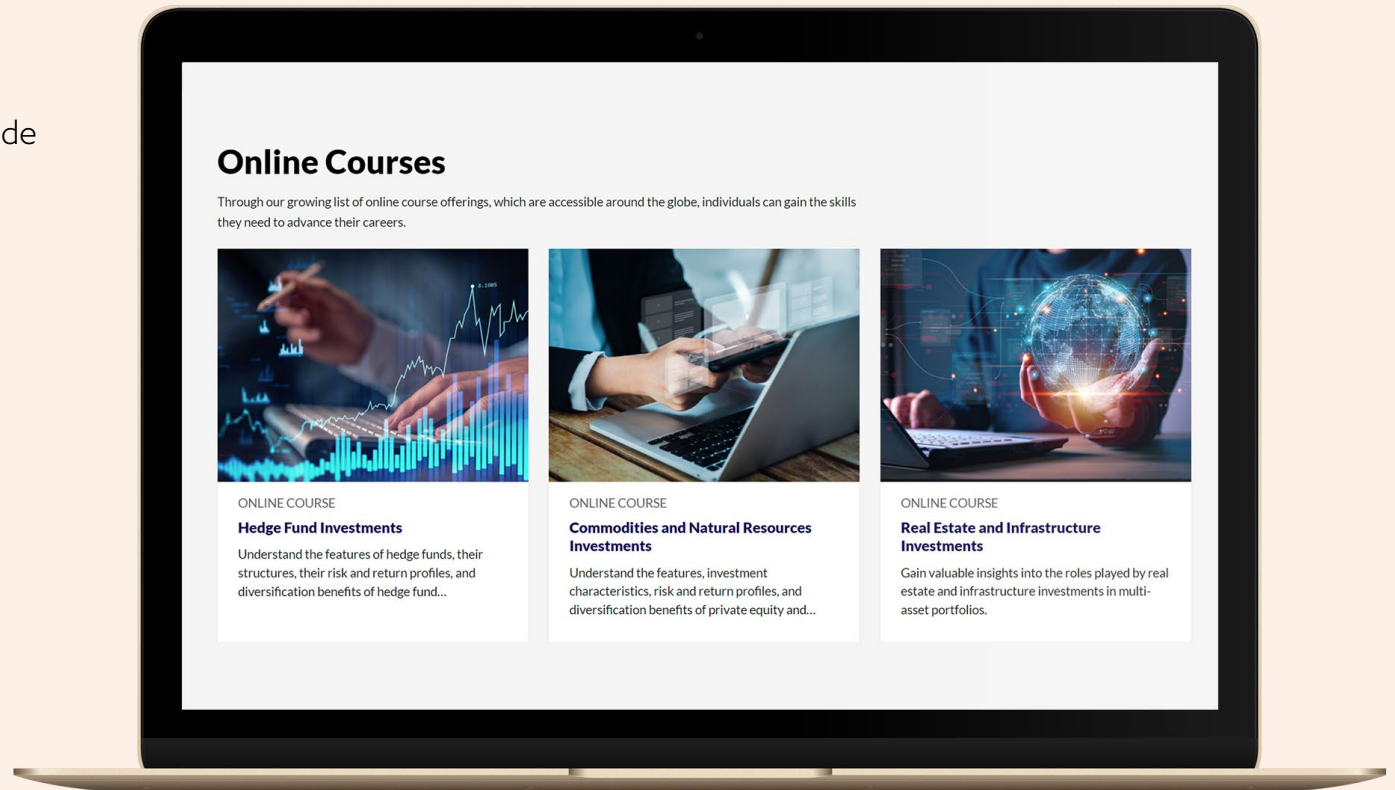
With over 70 years of experience as a trusted provider of professional learning, CFA Institute can help you excel in an ever-evolving investment industry.

Manageable time commitment to study alongside students' degree program (8–15 hours).

Relevant courses for students:

- ▶ Climate Finance
- ▶ Data and Statistics Foundation for Investment Professionals
- ▶ Introduction to Private Markets and Alternative Investments

[Check out more](#)





SECTION 3

Research for Students

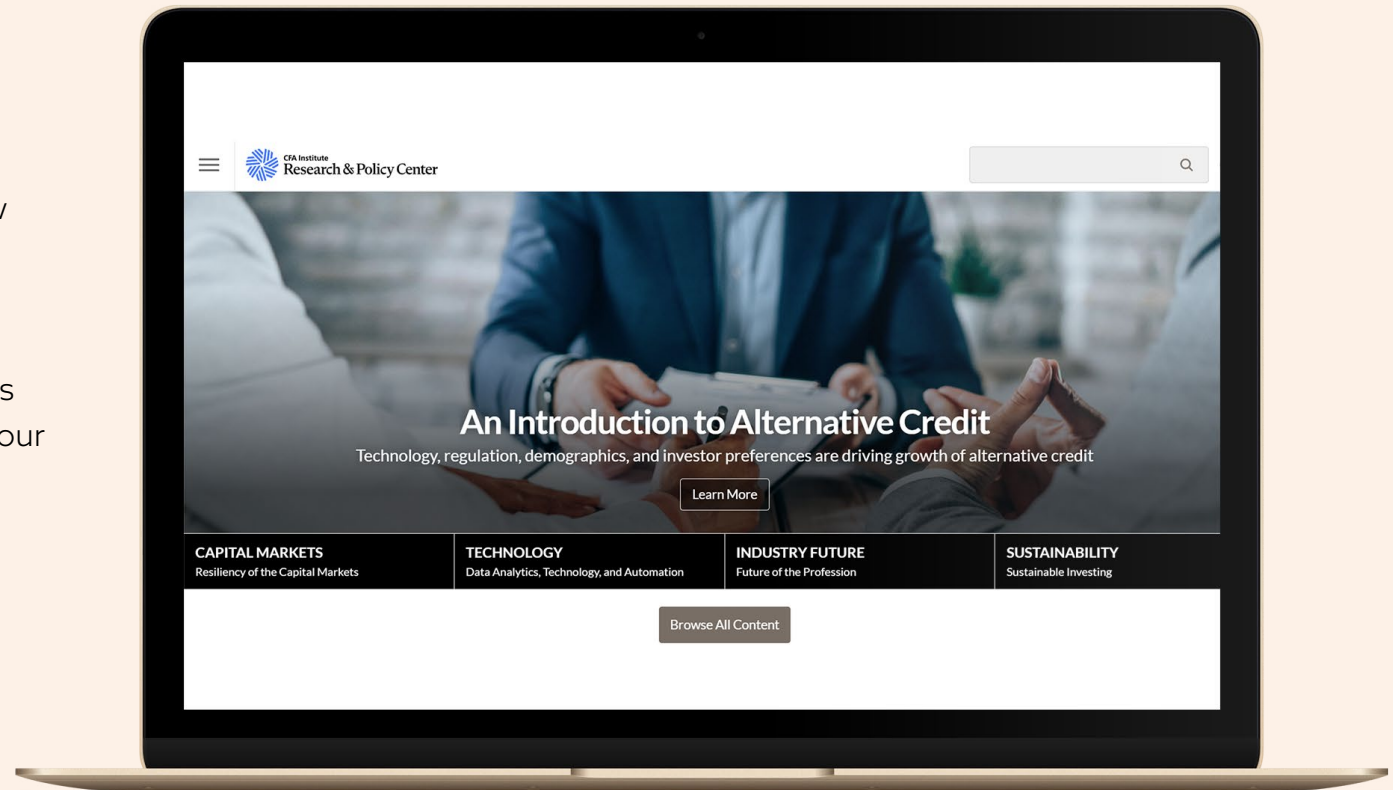
Research & Policy Center (RPC)

Provides students with a diverse, cross-disciplinary community of subject matter experts working collaboratively to address complex problems. The RPC focuses on research within four themes: capital markets, technology, industry research, and sustainability.

How to use the RPC:

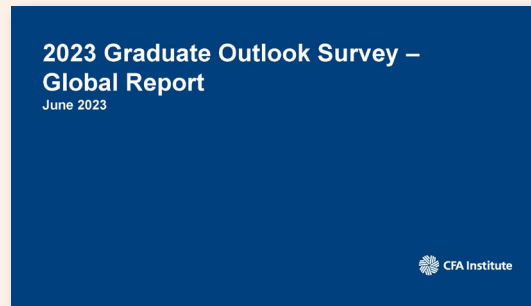
- ▶ Stay up-to-date on industry trends and show your future employer that you have read beyond academic literature
- ▶ Use our research in interviews to show your understanding of complex financial problems
- ▶ For projects and dissertations supplement your academic reading with the perspectives of working practitioners.

Get access



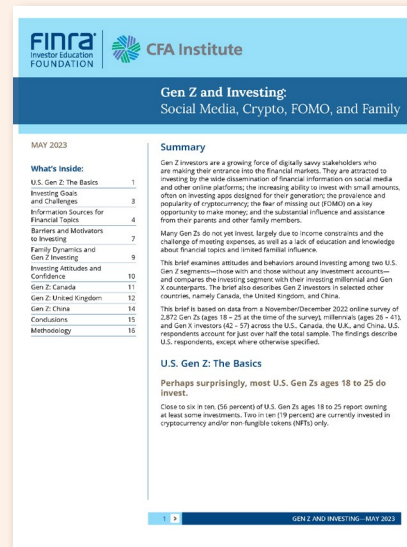
Student Focused Content

▶ Graduate Outlook Survey



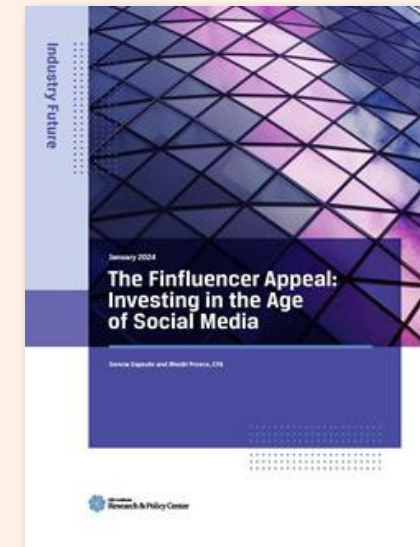
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▶ Gen Z investing preferences



Get access

▶ Finfluencers: Investing in the Age of Social Media



Get access



Thank you

For any additional questions about this toolkit,
please email emma.holyer@cfainstitute.org