



**CFA Society
Istanbul**
LET'S MEASURE UP™

2020

NEWSLETTER

**January
June**



**CFA Society
Istanbul**
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REVIEW OF PAST 6 MONTHS 2020 JAN-JUNE

As CFA Society Istanbul, we started the year with regulatory and employer outreach visits to Turkish Court of Accounts, Garanti BBVA, Denizbank and Heidrick & Struggles; and afterwards, we continued our university outreach visits to Arel University, Piri Reis University, Istanbul Commerce University, Istanbul Technical University, Yeditepe University and Boğaziçi University to spread more information about the CFA Program, Exams, Scholarships and University Affiliation process. In January there was a change of leadership and Onursal took over Presidency from Albert. Özyeğin University was the winner in the Local Research Challenge Final in February. In March, we held the 6th Women in Finance panel which was a huge success with a record number of participants. We shared 9 job opportunities to our members through email.

We held our first online university outreach events with Koç University, Dokuz Eylül University and Yıldız Teknik University. In May, we held our first member-only webinar with Zafer Sönmez, Turkey Wealth Fund CEO. In June, we held a virtual Ethics Workshop with Capital Markets Board of Turkey and participated in the Information Session by CFA Institute for unaffiliated universities which had attended the IRC. Recently, Kadir Has University became a participant of the CFA Affiliation Program, leading to 9 CFA affiliated universities in Turkey. You will find details of all our events in this newsletter. Among our upcoming events are the 3rd CEE Women in Investment Management Conference, Career Day, more Virtual Ethics Workshops and Mentorship Program. We will get in touch with you about our upcoming events and wish you healthy days during these challenging times!

2019-2020 LEADERSHIP

BOARD MEMBERS:

Onursal Yazar, CFA

Albert Krespin

Alper Alkan, CFA

Elif Altuğ, CFA

Ertunç Tümen, CFA

Oğuz Ayhan, CFA

Püren Kolabaş, CFA

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Derya Dağlı, CFA

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Sinan Veziroğlu

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DIGITAL TRANSITION OF EXAMS AND EXAM ROAD MAP

- Starting in 2021, Level I CFA exam will be administered electronically.
- Level I CFA exam will be offered four times a year: February, May, August, and November.
- Level I CFA exam will be held in more locations around the world.
- Level I CFA exam will be reduced to 180 questions from 240, resulting in a proportional reduction in testing time.
- Exams will be delivered in proctored exam centers with robust security measures in place.
- Please note that CFA Institute is only focused on delivering computer-based testing for Level I CFA exam. Level II and Level III CFA exams are still paper-based.

For Candidates Registered for the June 2020 Exam

You can find CFA Institute's announcement **For Candidates Registered for the June 2020 Exam** below.

"As the pandemic continues to intensify, with no certainty of when it will abate, CFA Institute has made the unprecedented decision to postpone the June 2020 CFA Exam administration globally.

Your registration will be transferred to one of the next two exam administrations. We are working with our partners around the globe to define exactly when those next two administrations will occur; however, we anticipate offering every level in December 2020. As soon as dates are confirmed, we will contact you via email with more information and allow you to select your preferred date."

December 2020, Level I December Exam Date: 5 December 2020

Standard Registration Deadline: 19 August 2020

Final Registration Deadline: 9 September 2020

Exam Day: 5 December 2020

Level I February Computer Based Exam Dates: 23 February 2021 - 1 March 2021

Registration Window Opens: 17 June 2020

Scheduling Window Opens: 17 June 2020

Early Registration Deadline: 13 August 2020

Registration Closes: 3 November 2020

Scheduling Deadline: 22 November 2020

Rescheduling Deadline: 25 January 2021

CFA Exam Window: 23 Feb - 1 Mar 2021

June 2021, Level II and III June Exam Date: 5 June 2021

Exam Registration Opens: 18 August 2020

Early Registration Deadline: 23 September 2020

Standard Registration Deadline: 17 February 2021

Final Registration Deadline: 17 March 2021

Exam Day: 5 June 2021

CFA INSTITUTE TO COMPLETE DIGITAL TRANSITION OF CFA PROGRAM LEVEL I IN 2021

Computer-based testing and digital learning platform among key offerings

After nearly 60 years administering paper-based testing for the CFA® Program, CFA Institute, the global association of investment management professionals, will transition its Level I program to computer-based testing (CBT) starting in 2021. The transition helps CFA Institute keep pace with the evolution of global testing and credentialing practices and improve the overall candidate experience. CBT enables CFA Institute to offer a wider selection of test venues, more flexible scheduling, and expedited exam results delivery.

"Our highest priority is to uphold the standard of the CFA charter. Maintaining the security of the exam and the rigor of what is expected of candidates is critical to that process," said Paul Smith, CFA, president and CEO of CFA Institute. "This is a natural evolution in how we design and deliver our programs. Offering computer-based testing is part of a larger digital transformation for the CFA Program that supports our mission to lead the investment management profession globally, increase our global relevance, and better reflect investment practice in today's workplace."

A one-stop digital learning platform, for example, known to candidates as the Learning Ecosystem (LES), is now available for Level I candidates. The LES offers the entire Level I CFA Program curriculum, all existing study tools, and features that help candidates

track and manage their learning through an online, personalized learning experience. The curriculum itself is evolving to include fintech topics such as artificial intelligence and machine learning.

Following a comprehensive procurement process, CFA Institute selected Prometric®, the global leader in service excellence for the testing and assessment industry, as its primary vendor for the transition to computer-based testing. Each year, Prometric delivers more than 7 million exams at professional testing locations that offer the highest levels of operational quality, consistency, and security. Prometric's commitment to continued investment in innovative technologies and delivery capabilities – including the addition of more than 250 new testing locations around the globe – will increase access to the CFA Program.

"Prometric is honored to have been chosen by CFA Institute as their strategic vendor for the digital transformation of the CFA Program," said Charlie Kernan, president and CEO of Prometric. "Like CFA Institute, Prometric has demonstrated an unwavering commitment to service quality and rigor in the provision of services to our clients and the working professionals they serve. We look forward to working collaboratively with the CFA credentialing team in the successful launch of the Level I CFA Program exam in 2021."

Source: <https://www.cfainstitute.org/en/about/press-releases/2019/cfa-program-digital-transition>

UNIVERSITY OUTREACH

3 FEBRUARY
AREL UNIVERSITY MEETING



11 FEBRUARY
PİRİ REİS UNIVERSITY MEETING



17 FEBRUARY
İSTANBUL COMMERCE UNIVERSITY MEETING



21 FEBRUARY
İSTANBUL TECHNICAL UNIVERSITY PRESENTATION



24 FEBRUARY
ISTANBUL COMMERCE UNIVERSITY
PRESENTATION



5 MARCH
YEDITEPE UNIVERSITY CAREER FAIR

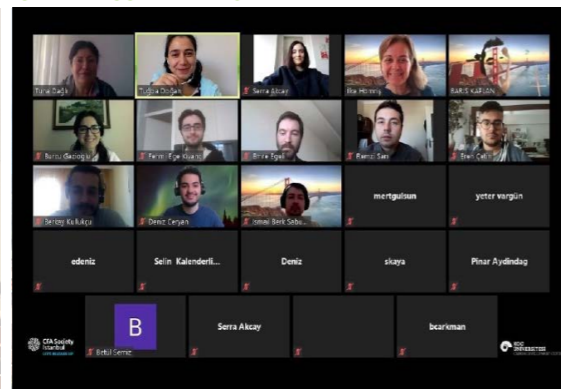


You can also access the news about this event from these [here](#) and [there](#).

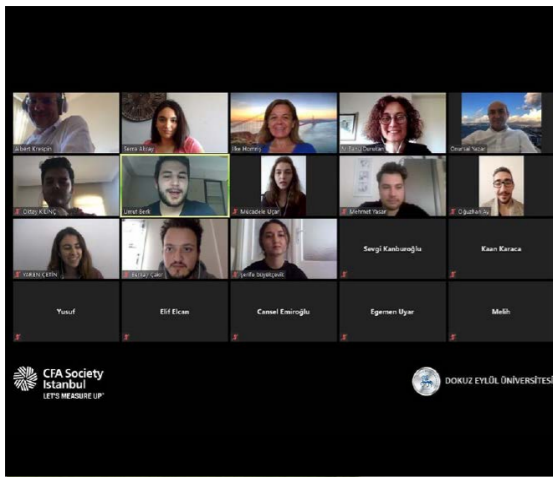
9 MARCH
BOGAZICI UNIVERSITY FINANCE BREAK



24 APRIL
KOC UNIVERSITY CAREER DEVELOPMENT
CENTRE ZOOM MEETING



27 APRIL
DOKUZ EYLUL UNIVERSITY ZOOM MEETING



20 DECEMBER
MARMARA UNIVERSITY ECONOMY CONGRESS



WHAT IS RESEARCH CHALLENGE? BIG CHALLENGE. BIGGER OPPORTUNITY



The CFA Institute Research Challenge is a great test for all students who are bold enough to face it. But, like any great challenge, the opportunities and rewards it offers are even greater.

This annual global equity research competition provides university students with hands-on mentoring and intensive training in financial analysis. Working in teams, students gain real-world experience as they assume the role of research analysts and are judged on their ability to value a stock, write a research report, and present their recommendations.

Is your university up to the challenge? Form your team and give your students the opportunity to compete against their peers from other schools to see who will become the local, regional, and global champions. Your participation also gives you the chance to showcase your university on a highly visible local, national, and global stage.

2019 PARTICIPATION

6,100+ Students

4,000+ Volunteers

1,150+ Universities

160+ CFA Societies

117 Local Challenges

95 Countries

RESEARCH CHALLENGE KICK-OFF MEETING



This year Investment Research Challenge (IRC) Kick-Off meeting, which was sponsored by İş Portföy, was held in early November 2019. This year there were a record number of 16 universities (17 teams) participating in the IRC and the company to be analyzed is Mavi Giyim. We would like to thank İş Portföy and Mavi Giyim for their contribution to the challenge.



IRC LOCAL FINAL 2020 SPONSORED BY İŞ PORTFÖY

The CFA Institute Research Challenge (IRC) is an annual, global competition that provides university students with hands-on mentoring and intensive training in financial analysis. IRC offers students the unique opportunity to learn from leading industry experts and compete with peers from the world's top finance programs. Each Research Challenge season leverages the efforts of over 150 CFA® member societies, 4000 member volunteers, and more than 6,000 students from over 1,000 universities. Local competitions (organized by societies) lead up to regional finals; regional champions then convene for the global final. This year the company to be analyzed was **MAVI**.

The kick off meeting was in November 2019 when MAVI CEO Cüneyt Yavuz made an investor presentation to the students from 17 local universities. We'd like to thank İş Portföy for being our sponsor. The students prepared equity research reports under the guidance of their academic and industry mentors. The reports were graded by experienced CFA® charterholder analysts. At the end of a tough election process the top 4 universities were "**Istanbul Bilgi University, Bilkent University, İzmir Economy University, Özyeğin University**". **Özyeğin University** was the team that lifted the cup at the end of the extremely difficult finals. We congratulate them for their IRC Local Final success.

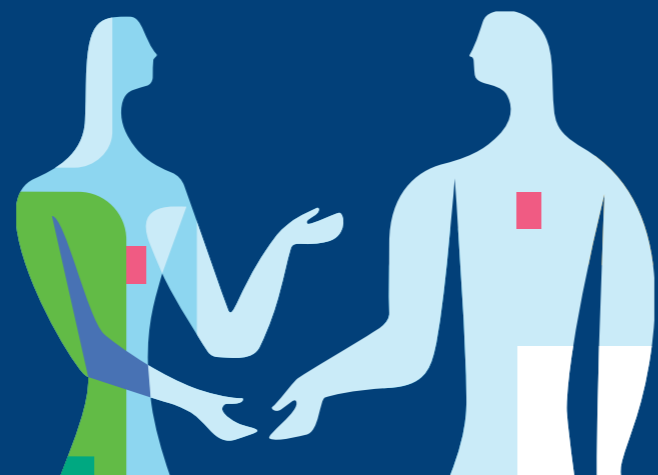


FREQUENTLY ASKED QUESTIONS



How The Challenge Works

Local CFA® Societies work with universities to assemble teams of three to five undergraduate and/or graduate students. Teams research and analyze a designated publicly traded company; prepare a written report on that company that supports a buy, sell, or hold recommendation; receive advice and support from a faculty adviser and an industry mentor; and present and defend their findings to a panel of industry experts. Winners from the local competitions advance to regional competitions in the Americas, Asia, and Europe, culminating in a global final.



Benefits Of Participation

- Showcase your university on a global scale
- Augment classroom learning
- Provide career opportunities for students
- Give students practical training equity research and exposure to industry experts
- Network with professionals, peers from other universities, and others in the community
- Evaluate your school's reputation and standing against competing schools

Who is eligible to compete?

Both undergraduate and graduate students.

When is the Challenge?

Locally hosted Challenges are held September-February of each year. Regional Finals are held March-April, followed by the Global Final in April. Visit your local CFA Society webpage to find out when the local Challenges are being held. Go to cfainstitute.org/societies/directory to find your society.

How is the Research Challenge different from a "stock picking" competition?

Students conduct in-depth analysis on a single company and produce a full equity research report. The winning team is chosen based on the thoroughness of its analysis and knowledge of one company, rather than whether their predictions of the stock price are correct.

How can I get involved?

You can organize a team to represent your university. Promote the event to your students and field your best team and then prepare them to compete. There are also opportunities to serve as a faculty adviser, presentation judge, report grader, and more. After you have organized your team, sign up through your local CFA Society.

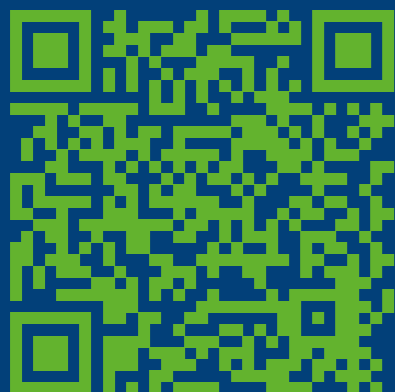
SEIZE THE OPPORTUNITY

Don't miss out on this exciting opportunity to accelerate the learning of your students while giving your university great exposure on a local, national, and global stage. For more information, please visit cfainstitute.org/researchchallenge or email researchchallenge@cfainstitute.org



SCHOLARSHIPS

CFA Institute's variety of scholarships allow more people to participate in the CFA Program. You can find the full list of scholarships below or take advantage of the scholarship [assessment tool](#) to find the scholarship best suited for you. All scholarships include a waived enrollment fee and discounted registration.

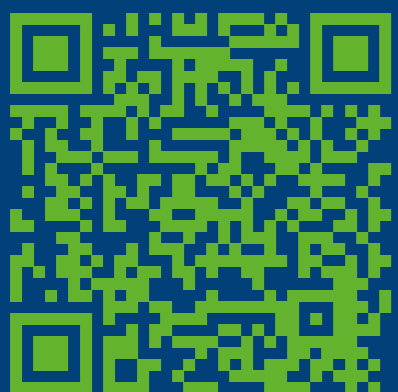


Access Scholarship

For individuals who may not be able to afford the program fees. Applicants must meet all CFA Program enrollment requirements. Exam registration **reduced to USD250**. The scholarship application will be open **from mid-May through 15 September**.

Women's Scholarship

For women who are interested in earning the CFA charter, do not qualify for other CFA Institute scholarships, and have not yet registered for their next exam. Exam registration **reduced to USD350**. Applications will be accepted for the December 2020 exam cycle beginning on **15 February 2020**.

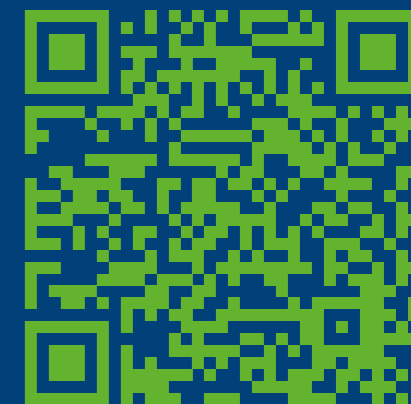


Student Scholarship

For students currently attending an affiliated university and have not yet registered for their next exam. Exam registration **reduced to USD350**. Application deadline is **8 August for the December 2020 exam**.

Professor Scholarship

For full-time college/university professors or administrators/department heads who teach a minimum number of credit hours at qualified institutions and have not yet registered for their next exam. Exam registration **reduced to USD350**. Application deadline is **15 August for the December 2020 exam**.



Regulator Scholarship

For full-time, qualified employees of non-profit entities that supervise or regulate the operations, standards of practice, or business conduct of the investment management industry and have not yet registered for their next exam. Exam registration **reduced to USD350**. Application deadline is **15 August for the December 2020 exam**.

Media Scholarship

Full-time or contract employees of media organizations that communicate and distribute financial news, data, and education and have not yet registered for their next exam. Exam registration **reduced to USD350**. Application deadline is **15 August for the December 2020 exam**.



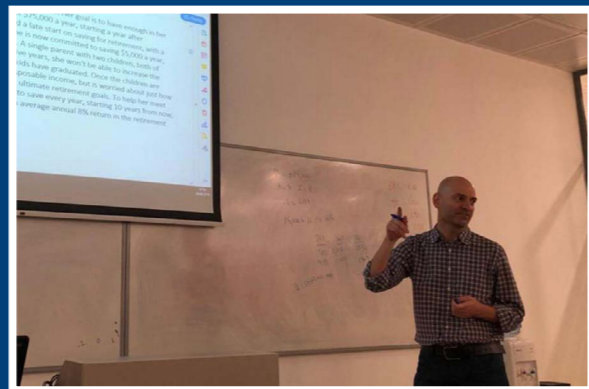
PREP COURSES FOR CFA EXAMS



We have been organizing Level 1 courses since 2013 and Level 2 courses since 2017. The 10 instructors are all CFA charterholders and are experienced in the subjects they are teaching. They also share their personal experience about their CFA® journeys. The training sessions are very interactive with course lectures and questions. There is also a full separate session in which questions from all areas covered are answered. The course starts in February and ends in April every year and are conducted on 10 Sundays during this period. CFA Society Istanbul Newsletter 15 read. (Courses for December Level I exam are held in September-November). It is quite affordable as well, and also includes a book consisting of the course slides, and breakfast where candidates network with each other and the lecturers. The announcements for the exact timing and location of the prep courses are

**This year's Prep Course has been cancelled after a few lessons due to Coronavirus outbreak.*

usually made 2 months in advance of the prep course start date. The announcements are made by e-mail to CFA® exam candidates and CFA Society Istanbul members as well as by posting on our social media accounts. The candidates are encouraged to take mock exams after the course to test themselves. They also have flexibility to reach out the lecturers to discuss their questions. Although the results and the feedback from the attendants so far have been pretty good, we aim to enhance the prep course each year and are open to suggestions. Please contact us at candidateprep@cfaturkishsociety.org for any suggestions. CFA Society Istanbul will continue supporting the candidates as the Society will grow and excel further with incoming charterholders!



REGULATORY OUTREACH

8 JANUARY TURKISH COURT OF ACCOUNTS

We visited Turkish Court of Accounts and are happy with the interest they have shown in the CFA program. We'd like to thank everyone for hosting us and particularly TCA President Seyit Ahmet Baş, Director General Mehmet Çıvgın ; Group Head İbrahim Uzunöz and Şule Alkan.



You can also access the news about this event from Turkish Court of Accounts [website](#).

EMPLOYER OUTREACH

9 JANUARY



16 JANUARY



27 JANUARY



You can access the article from Turkish Institutional Investment Managers' Association [here](#) on page 65.

18 FEBRUARY NETWORKING EVENT

Our networking event on 18 February was yet one of the most enjoyable gatherings! We are a growing society and are very happy to see new members joining more to our events.



4 MARCH WOMEN IN FINANCE

6th Women in Finance sponsored by Garanti BBVA



Our event began with a welcome reception prepared for our members and guests. Following İlke Takımoğlu Homriş, CFA's opening speech, the panel was moderated by our board member, Alper Alkan, CFA, while the speakers were Ebru Dildar Edin, Executive VP of Garanti BBVA; Prof. Dr. Esra Gençtürk, Rector of Özyeğin University; Banuhan Yürükoğlu, CFO of AKİŞ GYO; Şebnem Kalyoncuoğlu Ünlü, Board Member of ÜNLÜ & Co.

Speakers shared their family and educational backgrounds, the environment they were brought

up in, how they started their careers, work-family life balance and whether they faced any glass ceilings and biased barriers. We'd like to thank Ebru Dildar Edin and Garanti BBVA for their hospitality and for being our lieu sponsor.

We also supported EKİP, which is a project funded by the European Union and founded by Sandrine Ramboux, CFA. EKİP presented their special salads prepared by only women. The event turned out to be one of the most memorable events of the past year.



You can also access the news about this event from Özyeğin University's [website](#).

MOVING INTO A VIRTUAL EXPERIENCE

Our Digital Transition Experience and Online Presence

For approximately 10 years, social media has begun to be the world's main topic in both our daily and corporate lives; and we realized that having an online presence is a must! Therefore step by step, we enhanced our presence on **LinkedIn, Twitter, Instagram, Facebook and YouTube** to get in touch with you anytime and anywhere. You can find all our announcements, relevant information, event photos and videos on our social media accounts. Please visit them regularly to keep updated!

As mentioned above, CFA Society Istanbul has already been using social media actively besides the offline events; but during the Coronavirus outbreak of 2020, we had to shift our focus mostly on social media and online events. You can find all the relevant information about the CFA Program and Exams, CFA Institute's Research Articles and Webinars from CFA Society Istanbul, Societies All Around the World and CFA Institute.

We shifted our Board Meetings, University Visits and C-Events and Workshops online!

As a beginning, we held our first online university outreach visits to **Koç University** and **Dokuz Eylül University**, we would like to thank their academicians and students for their interest in the CFA Program.

Afterwards, we held our first webinar on **11 May with Zafer Sönmez, Turkey Wealth Fund CEO**. 60 people attended the webinar. We would like to thank him for the valuable talk and also all of our members for their attendance. It was a great experience for us. In the meantime, we are working and planning on how we can support our members online with webinars and online content.

In June, we held an online university outreach visit to **Yıldız Teknik University**. Our President Onursal Yazar, CFA, Vice President Albert Krespin, and Executive Director İlke Homriş, CFA attended as speakers to a webinar by **Yıldız Teknik University Center for Finance Governance and Sustainability**. In the webinar, we talked about the future of the finance profession and CFA Program in new normal. We shared our thoughts on how Coronavirus affected and will affect the finance profession and CFA Program in the future; and also, answered lots of questions from their students! Approximately 85 people attended the webinar, we would like to thank all of the attendants for their interest in the Investment Profession, CFA Program, and CFA Institute resources.

We participated in the **Information Session for unaffiliated universities who attended the IRC**.

We continue keeping our **Board Meetings** online for now.

FIRST VIRTUAL "ETHICS WORKSHOP"

We held an our first **Virtual "Ethics Workshop"** with participants from **Capital Markets Board of Turkey**. We would like to thank **Gary Baker, CFA**, for the opening remarks, and **Sonia Gandhi, CFA**, for the wonderful workshop! Also many thanks to **SPL, Tuba Ertugay** and **Emine Erbaş**, for helping us organize it.



ABOUT UPCOMING EVENTS OFFLINE

We are planning our offline upcoming events. Among our upcoming events are the 3rd CEE Women in Investment Management Conference, Career Day and Mentorship Program; but unfortunately, the date for these events are not certain yet as we are assessing the right time to meet you. We will get in contact with you as soon as the dates are certain and looking forward to meeting you in-person excitedly!

SOCIAL MEDIA POSTS

Explore Available Scholarships Scholarship Assessment

CFA Institute's variety of scholarships allow more people to participate in the CFA Program. Take advantage of our scholarship **assessment tool** to find the scholarship best suited for you. **All scholarships include a waived enrollment fee and discounted registration.**



CFA Institute

Webinar hosted by CFA Institute

APAC Regional Webinar: Taking the Pulse of COVID-19 Policy Response: Lessons from 2008 Global Financial Crisis and the Great Depression

11 Jun 2020, 1:30 pm - 2:30 pm Turkish Time

Topics to be Discussed Include:

- Fiscal and monetary policy response to COVID-19 thus far
- Has the policy response been too bold?
- Will today's actions create systemic risk?
- Will the breakdown of global supply chains necessitate a partial reversal of globalization?
- What are the other unintended consequences?
- How can we build resiliency for future crises?

*CFA Institute members can claim PL credit by providing their CFA Institute ID number when registering.



CFA Institute

Webinar hosted by CFA Institute

PRACTITIONERS' INSIGHTS: CONVERTIBLES AND EARLY STAGE VALUATIONS

18 Jun 2020, 3:00 pm - 4:00 pm Turkish Time

Learning outcomes:

1. Why do VCs invest through CPS in early stage companies?
2. What are the special rights attached to CPS?
3. How does one value these instruments?
4. What happens in down cycles to the various rounds of CPS—do they decline in value proportionately?
5. How does one use option pricing for the valuation of such instruments?

*Provide your CFA Institute ID number upon registration to facilitate the entry of PL credit into your record at the close of this live webinar.



CFA Institute

Webinar hosted by CFA Institute

Global Strategies for a New (Policy) World Order

22 Apr 2020, 9 - 9:45 pm Turkish Time

Investors can learn from the past, understanding how history repeats and how today's situation is different from anything we have seen before. Today's investors will need to adapt to a world of distortionary low interest rates, liquidity shortages, and market volatility. This new world brings risks and opportunities

*CFA Institute members can claim CE credit by providing their CFA Institute ID number when registering.



CFA Institute

Looking for a great **online and free** learning experience in finance? Check out **CFA Institute's Investment Foundations Program!**



CFA Institute

CFA Institute Investment Foundations® Program Curriculum

MODULE 1: INDUSTRY OVERVIEW
CHAPTER 1 The Investment Industry: A Top-Down View

MODULE 2: ETHICS AND REGULATION
CHAPTER 2 Ethics and Investment Professionalism
CHAPTER 3 Regulation

MODULE 3: INPUTS AND TOOLS
CHAPTER 4 Microeconomics
CHAPTER 5 Macroeconomics
CHAPTER 6 Economics of International Trade
CHAPTER 7 Financial Statements
CHAPTER 8 Quantitative Concepts

MODULE 4: INVESTMENT INSTRUMENTS
CHAPTER 9 Debt Securities
CHAPTER 10 Equity Securities
CHAPTER 11 Derivatives
CHAPTER 12 Alternative Investments



CFA Institute


CFA Institute Investment Foundations® Program Curriculum

MODULE 5: INDUSTRY STRUCTURE
CHAPTER 13 Structure of the Investment Industry
CHAPTER 14 Investment Vehicles
CHAPTER 15 The Functioning of Financial Markets

MODULE 6: SERVING CLIENT NEEDS
CHAPTER 16 Investors and Their Needs
CHAPTER 17 Investment Management

MODULE 7: INDUSTRY CONTROLS
CHAPTER 18 Risk Management
CHAPTER 19 Performance Evaluation
CHAPTER 20 Investment Industry Documentation

*Online and Free




<https://www.cfainstitute.org/en/programs/investment-foundations>

What to read today at cfainstitute.org?

Systemic Risk Council's Advice for Central Banks, Banks, and Governments

by Kurt Schacht, JD, CFA

The CFA Institute-sponsored Systemic Risk Council has called on policymakers to cease banks' equity buybacks and dividends and to support smaller emerging-market and developing economies throughout the coronavirus crisis.



CFA Institute

CFA INSTITUTE INVESTMENT FOUNDATIONS PROGRAM

The CFA Institute Investment Foundations Program covers the essentials of finance, ethics and investment roles, providing a clear understanding of the global investment industry.

This zero-cost, online learning experience is designed for anyone who wants to enter or advance within the investment management industry, including IT, operations, accounting, administration, and marketing.

Candidates who successfully pass the online exam earn the CFA Institute Investment Foundations Certificate, demonstrating a mastery of core foundational principles of the investment profession.

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CHAPTER 1 The Investment Industry: A Top-Down View

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CHAPTER 3 Regulation

MODULE 3: INPUTS AND TOOLS

CHAPTER 4 Microeconomics

CHAPTER 5 Macroeconomics

CHAPTER 6 Economics of International Trade

CHAPTER 7 Financial Statements

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UPCOMING EVENTS

A CLEAR UNDERSTANDING OF THE INDUSTRY

The CFA Institute Investment Foundations® Program has evolved to become an online learning experience offering universal accessibility and inclusivity, helping to further our commitment to build market integrity. The program gives those working with investment decision makers a clear understanding of the investment industry, roles and responsibilities, and the vital importance of ethical conduct.

BENEFITS TO FIRMS

ENTERPRISE RISK MANAGEMENT

Employees have a strong understanding of the complexity of the investment management industry, the importance of compliance, and the confidence to speak up when issues arise.

EMPLOYEE ENGAGEMENT

Employees gain a better sense of their role in the firm and how they belong, improving their engagement and making them more effective.

CLARITY

Certificants have a common understanding of industry structure and terminology, regardless of job function or geographic location.

PROGRAM BENEFITS

COLLABORATION

Work more effectively with global colleagues by understanding industry functions, building stronger relationships and raising your professional competence.

CONFIDENCE

Gain the knowledge to identify issues and the confidence to speak up. Get a better sense of your role and how you connect with the complex industry at large.

CURRICULUM

The program covers the essentials of the investment management industry:



MODULE 1:
Industry Overview



MODULE 2:
Ethics and Regulation



MODULE 3:
Input and Tools



MODULE 4:
Investment Instruments



MODULE 5:
Industry Structure



MODULE 6:
Serving Client Needs



MODULE 7:
Industry Controls

Find out more:
cfa.is/InvFound

Women in Investment Management Conference

Mentorship Program

Career Day



93% of certificate holders gained a clearer understanding of the investment management industry

WHAT?

The Investment Foundations Program is a free, comprehensive global education program that is completed online.

WHO?

The program is designed for all professional disciplines outside of investment roles, including IT, operations, accounting, administration, and marketing.

HOW?

There is no education or experience requirement. Upon registering for the program, you must meet the following in order to unlock the final exam:

- Wait 30 days from the time of registration
- Achieve 70% or better on Mock Exam A
- Achieve 70% or better on Mock Exam B

87% of certificate holders would highly recommend the program to a friend or colleague



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- [/cfaistanbul](https://twitter.com/cfaistanbul)
- [/company/cfaistanbul](https://www.linkedin.com/company/cfaistanbul)
- [/cfaistanbul](https://www.instagram.com/cfaistanbul)
- [/c/cfaistanbul](https://www.youtube.com/c/cfaistanbul)



WOMEN IN INVESTMENT MANAGEMENT CONFERENCE

"EMPOWERING THROUGH DIVERSITY: WOMEN IN ACTION"

CFA Institute states that women are the "universal diversifier" in investment management across global markets as minority; and as CFA Societies, we believe that an initial focus on gender diversity will yield lessons applicable to other dimensions of diversity. Therefore; we, as [CFA Society Istanbul](#), are organizing the 3rd CFA Institute CEE Women in Investment Management Forum under the name of "Empowering through Diversity: Women in Action" in Istanbul.

This conference takes its inspiration from [Women in Investment Management](#) which is a key initiative of CFA Institute. Goals of this initiative is to increase the number of women who join the profession and earn the CFA® Charter, to retain women in the profession and influence culture from within, and to create demand for diversity as an industry imperative.

The purpose of this conference is to bring together professionals with prominent women finance leaders like yourself, to create awareness of CFA Institute's [vision and mission](#). We aim to create a better future for the world through women in the finance sector. In former years, the other 2 conferences were held in [Kyiv](#) and [Bucharest](#); you can find the agendas of both meetings in the links. This year our topics are planned to be on Digital Transformation, Sustainability, Entrepreneurship, The balance between private, family and work life, New Currencies, Gender Diversity, Stress Man-

agement, Transformation and Economic Growth through women's perspective.

We believe that in this rapidly changing world, only if we are together, then can we create a better today and a greater future. Therefore, we would like to see all our members at the conference. We will let you know about more information in the future.

About The Date

Under the current global circumstances, we, unfortunately, had to postpone the conference to a future date. Yet, we will continue to work diligently on the calendar and agenda of the 3rd CEE Women in Investment Management Conference. With increasing precautionary measures and travel restrictions, which will impact the safety and participation of the conference, to ensure the well-being of our members, speakers and guests, we have decided to postpone the 3rd CEE Women in Investment Management Conference in Istanbul, on 11 September primarily to the second quarter of 2021. We would like you let you know that we are closely monitoring the ongoing situation and will inform you for an exact date in the future.

MENTORSHIP PROGRAM

In March 2020, we were planning a Mentorship Program for our members; but because of the Coronavirus outbreak, we had to postpone it. We think that such a program has many benefits for our members. But first, we need to highlight the difference between mentoring and coaching. Mentoring includes a process in which the mentor transfers his or her knowledge to the mentee. With this knowledge and by copying the behavior of mentors, the mentee is able to reach the goals set out for them. Coaching on the other hand, does not involve replicating the mentor's behavior. Instead, the coaching relationship focuses on asking the right questions and discussing the situation at hand. By doing this, the individual will find answers to his or her problems themselves. A coach will assist, challenge and encourage, whereas a mentor will direct, advice and teach.

During the program mentees will take advice from experienced professionals, support system during career development, networking opportunities and increase in motivation and focus; and mentors will improve coaching, management and leadership skills, give back to society in a direct and high rewarding way, networking opportunities and raises profile within own organization.



CAREER DAY

This March, we were planning a Career Day for the first time; but unfortunately due to Coronavirus outbreak, we had to cancel it.

Our speakers were Ayşegül Aydın, Heidrick & Struggles; Hakan Alp, Yapı Kredi Bank; Osman Tüzün, Garanti BBVA; Yavuz Elkin, DenizBank; Mahmut Akten, CFA, Garanti BBVA; Tim Bright, OneWorld Consulting; Ertuğrul Belen, Networking Akademi; Bob Stammers, CFA, CFA Institute.

We planned to speak about the future of the finance, how participants could enhance their skills to get ready for the upcoming advancements, how to develop one's personal branding and a speed-networking session.

We will plan a Career Day and meet our members and guests again when we are all ready and safe to meet again in person. Here is the agenda of the Career Day cancelled to give you an overview.

PLANNED EVENT AGENDA

Registration

Welcome Speech

İlke Homriş, CFA, [CFA Society Istanbul](#)

Ayşegül Aydın, [Heidrick & Struggles](#)

Hakan Alp, [Yapı Kredi Bank](#)

Osman Tüzün, [Garanti BBVA](#)

Yavuz Elkin, [DenizBank](#)

Mahmut Akten, CFA, [Garanti BBVA](#)

Tim Bright, [OneWorld Consulting](#)

Ertuğrul Belen, [Speed Networking](#)

Networking Reception

Bob Stammers, CFA, ["Investment Professional of the Future"](#)

Ertuğrul Belen [on LinkedIn](#)



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NEWSLETTER

**January
June**