



TRIPLE A RC ACADEMY  
KNOWLEDGE PAVES THE ROAD TO SELF-IMPROVEMENT

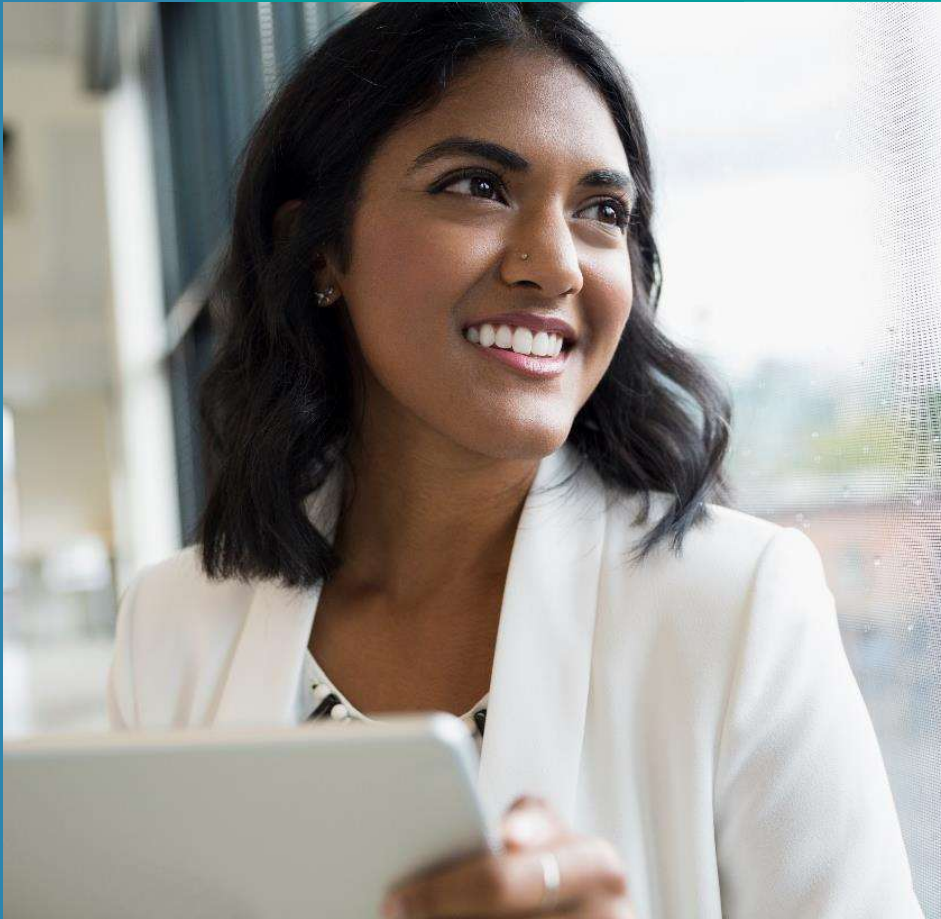
# CFA INVESTMENT FOUNDATIONS® CERTIFICATE

Overview

Triple A RC Academy  
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## Content

- I. Starting points
- II. Trainer introduction
- III. How it works
- IV. Topics Covered
- V. Study Load
- VI. Course assignments and Exam
- VII. Kick-off session



# I. Starting Points





# I. Starting Points

- Goal: self-study guidance & exam preparation for participants
- Online or class room set up (to be agreed with you)
- CFA Investment Foundations Certificate re-started February 2023
- Maximum group size 16 participants
- Sessions in English language, as is study material and Exam
- 12 months access to coursework (after registration)

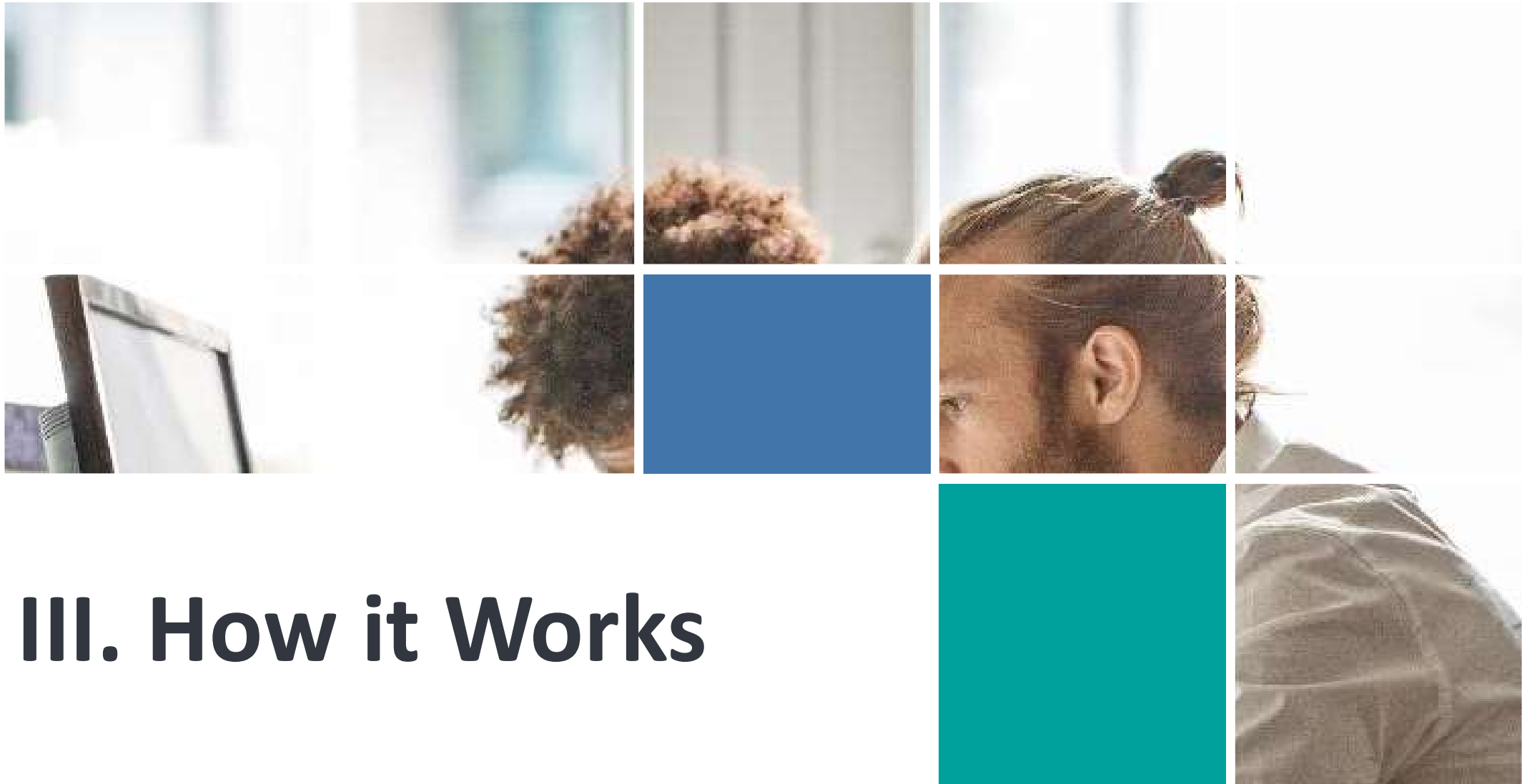


## II. Trainer Introduction

## II. Trainer Bio – Roger Coenen (1966)

- Well-experienced investment industry specialist
- Front-, Mid-, and Backoffice experience
- Self-employed consultant Regulatory Change & Sustainability & Climate Risk
- Well-experienced trainer in investment industry
- Owner of Triple A RC Academy
- CFA Approved Exam Prep Provider





# III. How it Works

# How it Works



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- Modular structure: six courses
  - Each **course** broken into modules
  - **Modules** broken into individual lessons
  - Each **course** requires participant to engage in module discussion board activities, end-of-module (EOM) assessment and end-of-course (EOC) assessment
  - Participants are required to complete **each module** in **sequential order**
  - **Moving forward** in their coursework is only possible until they satisfy the course completion criteria outlined above
  - Minimum passing scores apply for all assessments
  - Course is **online**, completed via Canvas<sup>1</sup> (account to be set up)
  - **60-90 hours** of total study time (excluding self-study guidance & exam training)
  - **Exam** is online (100 multiple-choice questions)
  - Shareable **certificate** upon successful completion
  - **Fee:** USD 350 (this is to be paid to CFA, and is excluding self-study guidance & exam training)

<sup>1</sup>Canvas is a web-based learning management system (LMS)





# IV. Topics Covered





## IV. Topics Covered

### 1. Industry Overview and Structure:

- Types of organizations
- Industry roles and responsibilities
- Key industry forces, particularly fintech
- Objectives, roles, and types of regulation

### 2. Types and Functioning of Markets:

- Security markets and trading venues
- Transactions
- Market efficiency
- Investment vehicles

### 3. Investment Instruments:

- Quantitative concepts
- Equity and debt securities
- Derivative investments
- Alternative investments

### 4. Investment Input and Tools:

- Microeconomics
- Macroeconomics
- Economics and trade
- Financial statements

### 5. Serving Client Needs:

- Investors and their needs
- Investment management
- Risk management
- Performance evaluation

### 6. Serving the Greater Good:

- Environmental, social, and governance investing (ESG)
- Diversity, equity, and inclusion in practice (DEI)
- Ethics and standards
- Ethical decision-making



## V. Study Load

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### Self-study part:

- 60-90 hours study time



### Self-study guidance & Exam training:

- 5 full day sessions (8 hours) of self-study guidance
- Alternatively, 10 half days of 4 hours can be agreed upon
- +1 half day exam training (4 hours)
- Total study load: 44 hours
- Spread out over appr. 9 months
- Exam preparation is online
- In-person fee on demand





## **VI. Course Assignments and Exam**



## VI. Course Assignments and Exam

- End-of-course assignments:
  - Consist of 10 multiple-choice questions, 70% score required to complete each course (three attempts per course)
  - Mandatory contribution to discussion board topic per course (replies are not-scored)
- Final Exam is online and is self-proctored
- Final Exam contains 100 multiple-choice questions
- Final Exam will become available only after all end-of-course assignments and discussions have been passed/finished



# VII. Kick-off session





## VII. Kick-off session

- Kick-off attendance is voluntarily and does not come with an obligation to participate in the self-study guidance and exam training (the program)
- Content of kick-off session:
  - I. Introduction
  - II. CFA Investment Foundations Certification®
    - Overview Program & Sessions Content
    - Registration & Study material
    - Exam (including Exam training)
  - III. Set up of self-study guidance
    - What to expect from you?
    - What to expect from me?
  - IV. Questions?
- Decision to participate in program can be made after kick-off and ultimately 5 business days after the kick-off session (then final participation list is established for invoicing)



A person is shown from the back, holding a rolled-up document or scroll. The scene is set against a sunset city skyline with silhouettes of buildings and a bright sun low on the horizon. The overall color palette is warm, with oranges, yellows, and purples.

**Thank you**