

California Polytechnic State University
Orfalea College of Business
Business 464 (at least 6 Fridays 9:10 AM to 4:00 PM)
CFA Challenge Senior Project, Fall 2014

Instructors: Cyrus Ramezani

Office Hours: TR: 1:00-3:00 PM and by appointment (Room 03 – 406)

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COURSE DESCRIPTION: This course prepares students to take the CFA level I exam. This course embodies the essence of Cal Poly's commitment to “Learn by Doing,” plus the unofficial motto of “roll up your sleeves and get the job done”.

PLEASE NOTE: This course will require a minimum 9 months commitment! The only prerequisite for the course is “**passion for success**”.

The Challenge Ahead:

1. The CFA test is a serious proposition requiring over 300 hours of focused study between now and December 2014 or June, 2015. This test is not for everyone. In fact, students with cumulative GPA below 3.00 (higher in finance courses) have a difficult time passing the test on the first try. Such students would have a real uphill battle and may have to spend 500 hours of study to have a chance. There is no glory to sign up for a test that costs over \$1300, when you may have little chance of passing.
2. Please sign up for the course if you can commit the time and the effort to pass. You will be required to take part in all practice tests and group meetings, as well as selected presentation by industry professionals, or other related events.
3. Those who take on this challenge should know this: You will have to significantly rearrange your classes and your personal life (no more party nights Thursday through Sunday). You also would have to reduce your work hours and commit to a life of being very focused and studious, particularly during the terms preceding the exam. Take a look at the realities of your personal life. Don't take on this challenge if you cannot make the necessary sacrifices!
4. As you start the Fall term and commit to the CFA challenge, you need to learn about the following issues. I will discuss these topics during our meeting:

- How to learn about the CFA test (what areas it covers and at what level),
- How to register for the test and collect the appropriate study materials,
- Test taking and test preparation strategies,
- How to design a personal plan of action, including detailed weekly study plan till the exam
- Where to acquire the necessary tools to succeed (test prep materials, and 7000 practice questions),
- How to make the necessary behavioral changes (give up partying, reduce your social activity,...),
- How to form teams and study together,
- How we will help you to succeed in passing the CFA test and gain good employment,
- What kind of activities will we engage in as a group,
- How you will be graded in this course,
- And other issues and your questions.

5. Within a couple weeks, you must address each of the above topics, come up with a clean plan of action for the rest of the summer and the rest of the year, and have the discipline to execute that plan. How can I help you? My role is to serve as a coach and a mentor. I will hold practice tests (at least 9) and help you gauge your progress. I will also help you figure out which courses to take to enhance your chance of passing. Most importantly, I stand ready to guide you one-on-one and encourage you along. I cannot help those that do not recognize the importance of taking on self-inflicted challenges in life.

6. On your way to passing the CFA test, you need to take every course you sign up for very seriously. Insist on doing excellent work in all your courses!

7. Please keep our scheduled class time (Fridays 9:00 AM - 4:00 PM) open. We will hold all our meetings and practice tests during this time slot.

8. Please fill the attached survey if you still plan to take on this challenge. Write legibly and make sure your email is readable. I will contact those who plan to take the December test. We will schedule a practice test before you leave for your summer break. I will also provide you with study materials!

9. Please make sure to meet the other students who are taking on this challenge.

10. Students who plan to take the December test must meet with me to discuss their plans, one-on-one.

Bus-464 Class Survey



Professors Cyrus Ramezani

Name _____ Age _____ Year in school _____

Telephone _____ Email _____
(Optional)

Your Concentration(s) _____ What is your GPA: _____

Do you currently have (or have you had in the past) any internships or jobs related to finance and investment management? _____ If so, please describe your experiences:

What are your career plans ? Which part of finance industry and where would you like to work?

Rate your knowledge of the content of the CFA test? _____

Do you know anyone who is a CFA? What job does she/he have? _____

What financial press do you read on regular basis? _____

What is your target graduation date? _____

Why are you taking the CFA Senior Project rather? _____

What other courses are you planning to take in Fall? _____

How many hours per week are you working in Fall? _____

Can you commit the necessary study time to this challenge? _____

Which of the following courses have you taken and how long ago:

_____ Finance Courses:

Course	Term
431	-----
438	-----
439	-----
Others (please list,)	

_____ Statistics (please list) -----

_____ Economics

311	-----
313	-----
424	-----
339	-----
Others (please list,)	

_____ Accounting (please list)

_____ Others Relevant Courses (please list)

I hope you will enjoy your Senior Project experience. Please let me know if you have any particular concerns, constraints or obligations that you want me to be aware of during this class.