

Claritas[®]

Investment Certificate

GIVING YOU A CLEAR UNDERSTANDING OF INVESTMENT INDUSTRY ESSENTIALS

THE BIG PICTURE

The Claritas Investment Certificate is a comprehensive global education program that gives financial services professionals a clear understanding of the essentials of the investment industry.

Whether you're just starting a career in financial services or want to learn essential industry concepts, the Claritas program offers an accessible solution for breaking through the complexities of the global investment industry and raising your professional profile.

IS THE CLARITAS PROGRAM RIGHT FOR YOU?

The program is for all professional disciplines in the financial services industry outside of investment roles—from client services to compliance; from human resources to IT and operations; from sales and marketing to legal and administrative services.

There is no education or experience requirement for the Claritas Investment Certificate; however, you should feel comfortable with the English language. The multiple choice, computer-based exam can be taken at your convenience at available test centers around the world. Successful candidates will be awarded the Claritas Investment Certificate by CFA Institute.

WHAT WILL YOU LEARN?

The self-study, program requires approximately 100 hours of study time and covers the fundamentals of the investment industry across seven course modules:

- Module 1:** Industry Overview
- Module 2:** Ethics and Regulation
- Module 3:** Inputs and Tools
- Module 4:** Investment Instruments
- Module 5:** Industry Structure
- Module 6:** Serving Client Needs
- Module 7:** Industry Controls

HOW MUCH DOES IT COST?

INDIVIDUAL PRICE US\$685

NOTE The price includes access to all study materials and one exam sitting. We also encourage you to talk with your employer to take advantage of our corporate pricing program.

WHAT IS THE REWARD?



Bring clarity to complexity

Develop a deeper understanding of the investment industry with a global education program that gives you a strong foundation for working in a complex and dynamic profession.



Share a common understanding

Raise your professional competence by understanding industry functions, relationships, and your role and responsibilities in the big picture.



Improve your performance

Improve your performance by gaining a common global standard of the industry and sharing a common body of knowledge, whether you work in New York, London, Mumbai or Hong Kong.



Stand out from your peers

Gain a fundamental framework and knowledge of the investment industry so you stand out from the crowd in a competitive industry.



Build your confidence

Feel more confident working and communicating with global colleagues and clients by understanding the industry and how your role impacts the rest of the business.

LEARN MORE ABOUT THE CLARITAS PROGRAM

Explore program benefits, sample chapters, timelines, fees, and more at www.cfainstitute.org/claritas or follow @Claritas on Twitter