



# Quartic

## CFA<sup>®</sup> Program

Courses and study support for the  
Chartered Financial Analyst<sup>®</sup> Program



Face-to-Face • Live Online • Distance Learning



Pass Guarantee



Price Match



Range of Discounts

Approved Prep  
Provider  CFA Institute

Quartic Training Limited is a  
member of the CFA Institute  
Approved Prep Provider Program

# Welcome to Quartic

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## Dear Candidate

I am delighted to welcome you to Quartic and our courses for the Chartered Financial Analyst® (CFA®) exams. Inside these pages you will gain an understanding of Quartic’s unique approach to education – intuition, clarity of materials, support, flexibility and value.

However you choose to study, we offer a range of options. Whether face-to-face, live streamed or via our extensive online video and testing facilities, you will receive the full Quartic experience.

Our training centre is a moment’s walk from Liverpool Street station, in the heart of the City of London, and provides you with world class conference facilities.

**Nicholas Blain MA FCA FCSI CFA**  
Chief Executive



“

Nicholas is one of the best tutors I have ever studied under. His unique ability is to explain complicated concepts in simple words and graphics, passing on his excellent grasp of the subject.

”

**Alroy Dcruz, CFA**

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# Why Quartic?

The CFA® Program is a real investment in your future, and it takes a considerable amount of time and dedication to be successful. If you decide to take on these challenging examinations, you should give yourself every possible advantage.

At Quartic, we believe we can help optimise your time and maximise your chances of success.

## One-to-One Tutor Introduction

Our support begins on the day you enrol with us. Whether in person or online, you will be invited to a one-to-one meeting or phone call with your course tutor. The instructor will explain the curriculum and advise individual studying techniques that suit you and your background.

## Materials

We invest significant energy and resources into producing what we believe are the best materials on the market today. Alongside our Quartic Online portal, our graphic workbooks make complex topics easier to grasp – clear, user-friendly videos and materials that provide an intuitive understanding of finance, not just pages of algebra to memorise.

## Value

Our courses range from a 1-day overview up to classes containing detailed analysis of every learning outcome statement.

## Flexibility

Learning can be face-to-face in class, live streamed or via our Quartic Online video library.

## Support

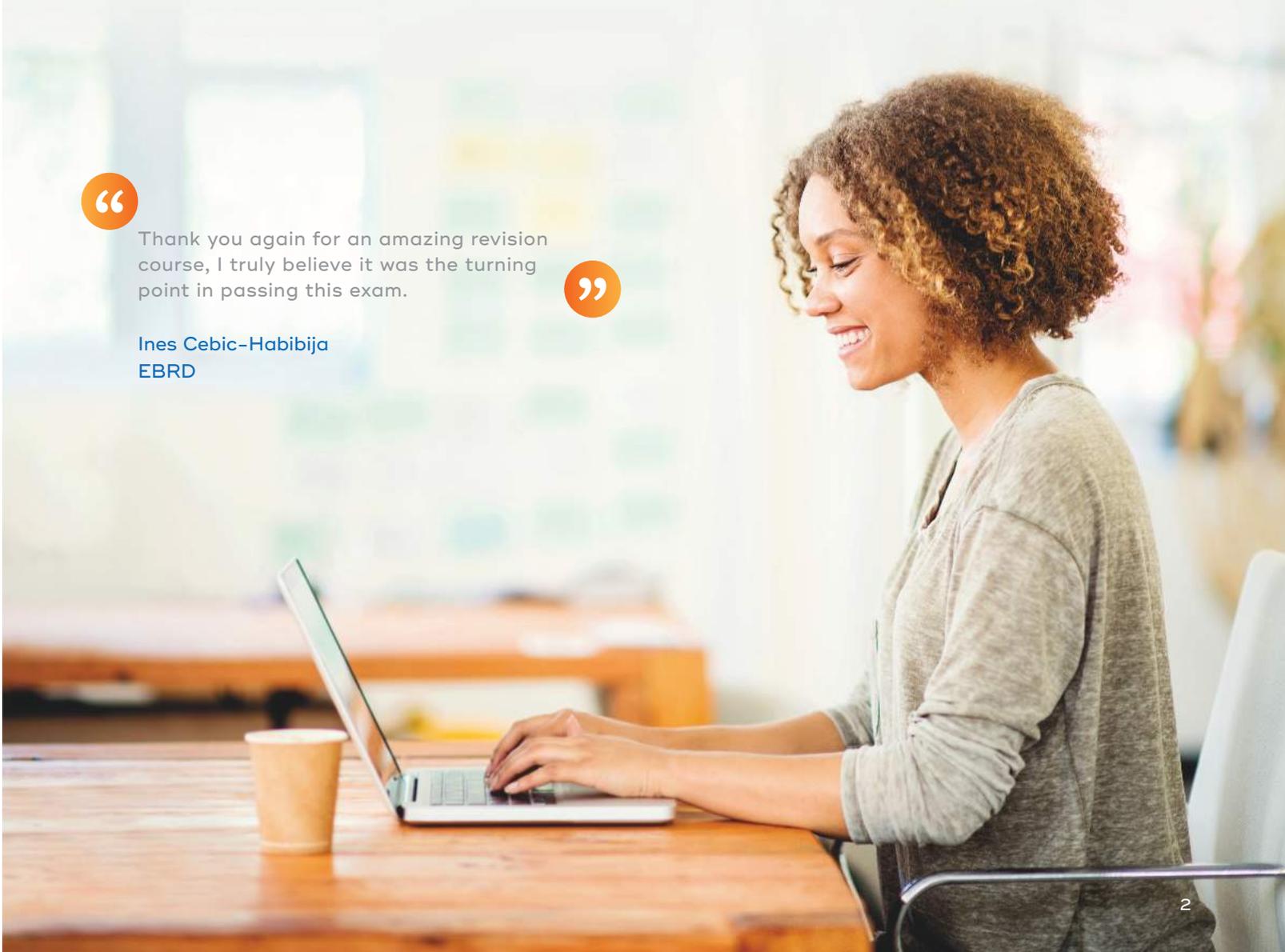
Our tutor team is available to support you every working day including an evening tutor helpline in the weeks leading up to the exam.

“

Thank you again for an amazing revision course, I truly believe it was the turning point in passing this exam.

”

Ines Cebic-Habibija  
EBRD



# About the CFA® Program

The CFA® Program leads to one of the most recognised and respected professional designations within the global investment industry. Whether you are a finance professional looking to increase your expertise and marketability, or someone making a career change into the world of financial analysis from other disciplines, the CFA charter will position you at the forefront of career opportunities within the investment industry.

The CFA Program attracts more than 200,000 candidates from over 160 countries to the exam each year, and there are local member societies in more than 70 countries and territories.

In three successive exams you will be assessed on subjects including ethics, quantitative techniques, economics, financial reporting & analysis, corporate finance, equity, fixed income, derivatives, alternative investments and portfolio management.

The knowledge you gain while studying will be invaluable to your future career, and the CFA charter has become universally recognised by employers and investors as a mark of excellence and integrity within their profession.

The CFA Program includes exams in three levels, which must be passed sequentially. The Level I exam is conducted each June and December, while Level II and Level III are administered just once a year in June. Candidates may register for only one exam at a time and must wait to receive their results before registering for the next level.

	Jun	Dec	Jun	Dec	Jun
Level III	×		×		×
Level II	×		×		×
Level I	×	×	×	×	×

## Entry Requirements

Before you enrol in the CFA® Program and register for your first exam, you must meet the entry requirements listed below:

- Have a bachelor's (or equivalent) degree
- or be in the final year of your bachelor's degree course at the time of registration
  - or have four years of professional work experience (this does not have to be investment related)
  - or have a combination of professional work and college experience that totals at least four years. Part-time positions do not qualify, and the four-year total must be accrued prior to enrolment.

## Registration fees

Candidate fees to CFA Institute consist of (1) a one-off enrolment fee for new candidates only, and (2) an exam registration fee.

Please note that the exam registration fee increases at each of the first two deadlines, with the cheapest fee being paid for candidates enrolling before the September deadline for the following June exam, or before the March deadline for the December exam.

Payment Deadlines		Study Time
June Exam	December Exam	
September	March	8 – 9 Months
February	August	3 – 4 Months
March	September	2 – 3 Months

# CFA® Program Levels

## Understanding Levels I, II & III

The three levels follow a three-stage investment process. Level I includes a detailed drilling of investment tools, Level II applies these tools to asset valuation and Level III completes the big picture with portfolio construction and management.



**Ethics & Professional Standards**

**Investment Tools**

- Quantitative Methods
- Economics
- Financial Reporting & Analysis
- Corporate Finance

**Asset Classes**

- Equity
- Fixed Income
- Derivatives
- Alternative Investments

**Portfolio Management & Wealth Planning**

### Level I - Tools

Level I covers the foundations of finance with a significant emphasis on the analytical tools, especially accounting and quantitative techniques. Although the depth of these topics may seem challenging, the benefit to candidates is the ability to “uncook the books” and get behind the published numbers.

The course curriculum contains ten different subjects, and it is exciting to see how many interlinks there are between topics as you progress through them; you cannot understand bonds without a bit of quants, and equity valuation hinges directly on the financial statements of a business.

### Level II - Asset Valuation

Level II is often seen as the toughest technical level of the CFA Program, however with a solid grounding from Level I this next step is immensely rewarding.

In this level you will start to see the “big picture”, with economics, portfolio management and accounting delving into the issues of international investing.

Much of Level II focuses on asset valuation: you will see fixed income and derivative models that look pretty complex, but are, in fact, highly logical when explained in the clear and intuitive Quantic style.

### Level III - Portfolio Management

The final stage of the CFA Program, Level III has a strong focus on wealth planning and portfolio management. Some of the analytical subjects (accounting and quants in particular) drop from the curriculum, much to the disappointment of many candidates! Instead, you will investigate in detail the requirements and psychology of investors, with asset valuation being primarily from a portfolio perspective: how do shares, bonds, derivatives and alternatives help us to achieve a client’s objectives?

Evaluation and synthesis skills that you gain during the preparation for your final exam will enable you, on successful completion of Level III, to enter your workplace with your head held high: as a CFA charterholder.

### Exam format

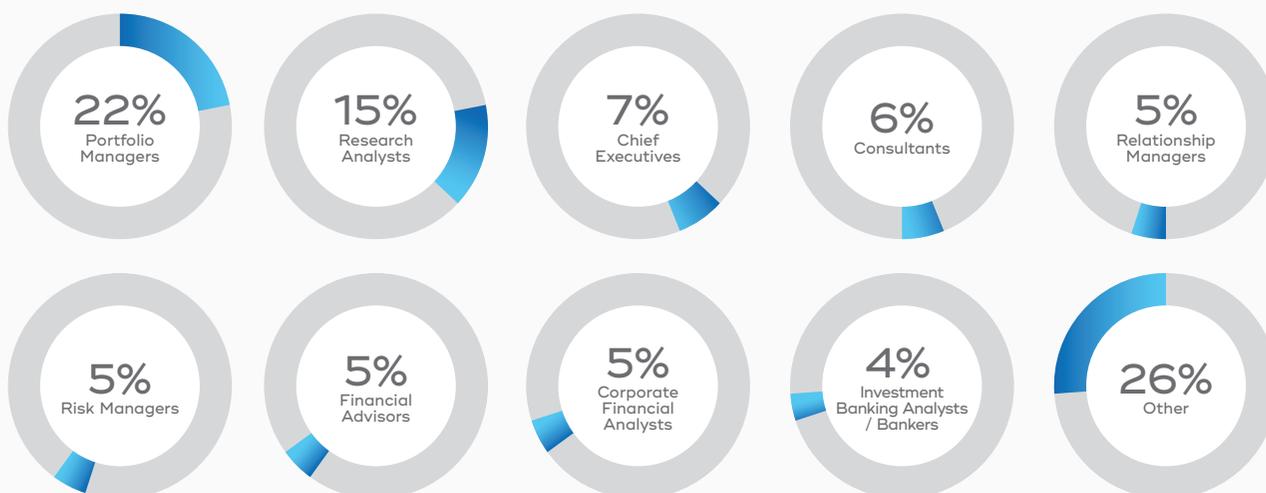
The CFA exams include three types of question format.

The Level I exam consists of multiple choice questions only.

The Level II exam consists of case study item set questions only, with six multiple choice questions per item set.

The Level III exam morning session comprises essay questions and the afternoon session is composed of item set questions.

# Benefits and Career Options



**Investment professionals** who want to specialise, enhance their careers, or gain a wider investment perspective, choose to study the CFA® Program to achieve these goals.

**Non-investment professionals in the field of investments**, such as lawyers and accountants, choose to earn the CFA charter in order to develop and broaden their professional expertise.

**Students entering the finance or investment professions** understand there is no better way to show their determination and relevant qualities to employers than by enrolling in the CFA Program and beginning the route towards the CFA charter.

## The CFA® Charter

In order to be awarded the CFA charter you must:

- Have four years of qualified investment work experience (speak to us for details of what is eligible)
- Become a member of CFA Institute
- Pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct
- Complete the CFA Program.



I passed the CFA Level III Exam. I just wanted to say thank you so much for all your help. You were great Tutors and went beyond answering all my questions very promptly.

Niha Islam  
Centrica



# The Quartic Journey

Enrolment & Support	Start-up	Education Classes	Revision	Mock Exam
 Face-to-Face	1 Day	8 Days	5 Days	1 Day
 Live Streaming	1 Day	8 Days	5 Days	N/A
 Video Library	N/A	50+ Hours	Distance Learning Plus Students join live Revision Classes	Online



CFA®  
EXAM

## What's included?

	Face-to-Face or Live Streamed Education Classes	Education workbooks	Video Library	Progress Tests	Online Question Bank	Face-to-Face or Live Streamed Revision Classes	Revision Workbooks + Question Bank	Support + Helpline	Face-to-Face Mock Exam
Core Package	✓	✓	✓	✓	✓	✓	✓	✓	✓
Education	✓	✓	✓	✓	✓			✓	
Revision						✓	✓	✓	
Distance Learning Online			✓	✓	✓			✓	
Distance Learning Full		✓	✓	✓	✓		✓	✓	
Distance Learning Plus		✓	✓	✓	✓	✓	✓	✓	✓

# Face-to-Face Learning

Face-to-Face classes take place in Quartic's Liverpool Street training centre and provide candidates with the highest level of interaction with their instructors. Our Tutors encourage candidates to challenge technical content, as this creates more detailed discussion and a foundation for a solid understanding.

Engaging with other delegates in class helps to maintain momentum and motivation and enhances the learning experience.

## One-to-One Tutor Introduction

This session lays the foundation for an efficient personalised timetable taking into account your own strengths and weaknesses.

## Start-Up

The 1-day Start-Up course introduces some of the more challenging topics and provides a good grounding for your future studies.

## Quartic Online

Our face-to-face candidates have access to the Quartic Online portal, which opens up our online world of studying resources. Please see next page for more information.

## Education

Delivered over four modules, Quartic's signature Education classes cover every topic and reading of the CFA® curriculum. During the 8 days or 16 evenings the Tutor will provide insights and inspiration in every corner of your workbooks. By gaining an intuitive understanding of the curriculum you will find that you can answer challenging questions with more confidence, and with less need to memorise page after page of formulae.

## Revision

All subjects are reviewed over 5 days or 10 evenings during our Revision phase, with the focus being on question practice and exam techniques; lots of tips and lots of inspiration, hopefully leading to lots of correct answers!

## Mock Exam

This 6-hour invigilated Mock Exam is designed to mimic the actual exam in both format and difficulty. We mark and grade these papers to give you the best guidance on how to focus your final days of preparation.

## Support

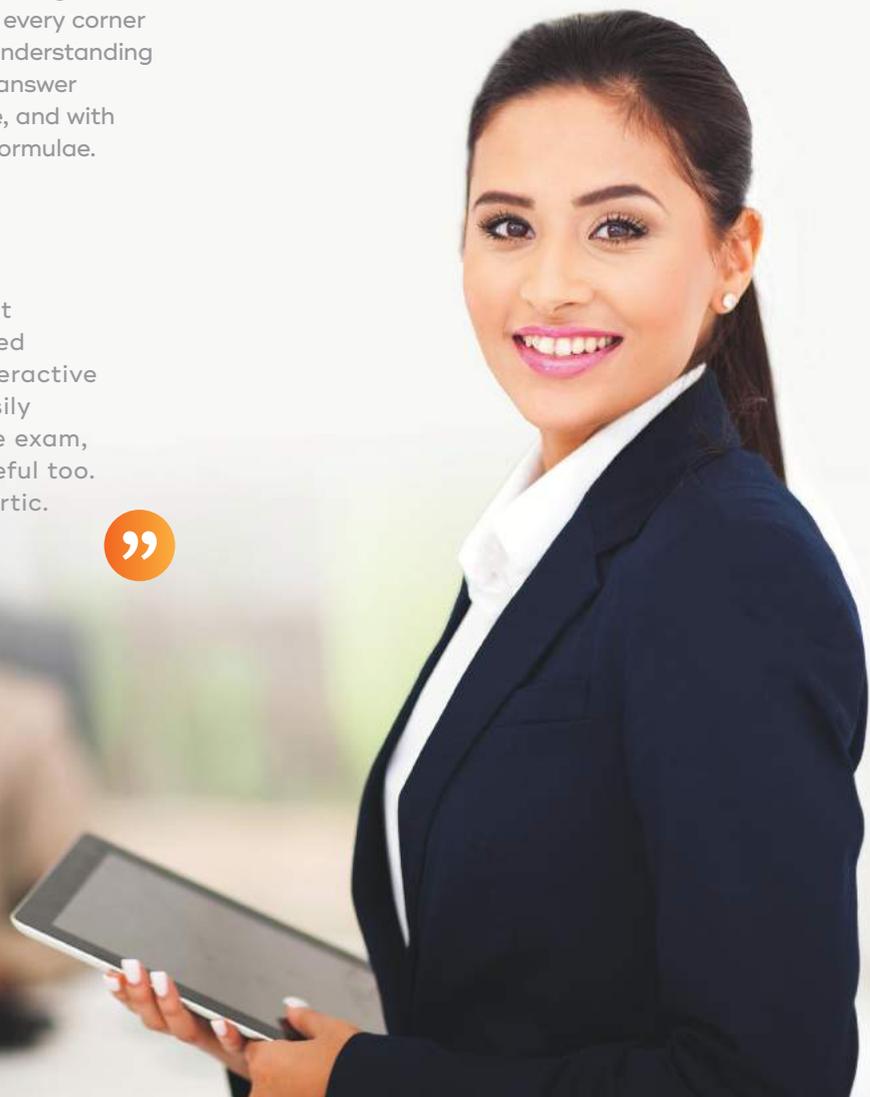
The Quartic Team will be with you throughout your learning journey, to provide support in any aspect of your studying for your CFA exams. From the day you enrol with us through to the exam day, we are here to help you succeed.

“

A big thank you to Quartic without whose help I would not have passed Level I first time. Classes were interactive and entertaining, the material easily digestible and very relevant to the exam, and the videos were extremely useful too. I would definitely recommend Quartic.

Leyla Dorri  
CFA Level II candidate

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# Quartic Online



The Quartic Online portal is where you will find a wealth of resources, including a comprehensive video library, question banks and progress tests, and many other learning tools. This powerful portal is also your window to live streamed classes, Tutor communications and a progress dashboard.

## Video Library

Our Video Library includes a bespoke presentation of every reading in the CFA curriculum. Our instructors bring the curriculum to life with detailed explanations of all learning outcome statements and plenty of real life examples. The videos include more context and worked examples than live classes, enabling you to explore topics in more depth at your own speed.

## Live Streaming

Some of our classes are interactively live streamed, giving you the ability to join the class in real time from anywhere in the world. Perfect for that mid-week business trip or for our international candidates.

## Calculator Tutorial

This tutorial shows you the ropes of your Texas Instruments BA II Plus calculator, from basic setup through to advanced features, saving you valuable time in the exam.

## Essential Financial Mathematics for the CFA® Program

An understanding of financial maths is key to much of the CFA curriculum. Our online course will get you up to speed.

## Introduction to Accounting for the CFA® Program

Don't know your balance sheet from your income statement? The CFA Program contains a lot of accounting and our invaluable online course is designed for those of you who want a solid grasp of the basics.

## Question Banks

Our extensive online Question Banks enable you to test yourself on every topic, with fully explained solutions to help you keep to your target timetable.

## Progress Tests

There are four 1-hour progress tests, one for each of the modules. These are of exam style and difficulty to give you an idea of how you are progressing through the syllabus.

## Mock Exams

The Quartic Online portal provides you with the facility to take our Mock Exams at home or on the move. This may be a more convenient environment for those unable to attend the invigilated session.

## Progress Dashboard

The Quartic Online Dashboard gives you a graphic summary of your progress through the videos, tests and question banks.

“

The tutors were enthusiastic, the classes enjoyable, the explanations clear and intuitive, and with excellent teaching materials Quartic helped me to pass each level at first attempt.

”

Kate Kalashnikova  
CFA ACA Analyst



# Special Offers



## Pass Guarantee \*

If you attend our Core package and are subsequently unsuccessful in your CFA® exam, we will give you a free Education course on the next available exam sitting.



## Price Match \*

We believe we provide the best CFA courses and the best value. We will match any delegate day rate from any other approved prep provider. Please contact us for details.



## Range of Discounts \*

If you have previously been unsuccessful in your CFA exam, you can re-sit with Quartic and get up to 25% off our tuition fees, even if you are joining us for the first time.

## Free 1-day Start-Up

### Not sure if the CFA® Program is right for you?

Join us for one of our regular Start-Up days and, with no cost or commitment, experience a highly interactive 1-day introduction to the CFA Program.

The tutor will guide you through different topics that you'll see in the curriculum, focusing on some of the tougher areas. For Level I this will include parts of Quantitative Methods, Financial Reporting & Analysis and Asset Valuation.

During the day, Tutors and staff will be available to answer all your questions and help you to decide if the CFA Program is right for your career.

We also run Start-Up days for Levels II and III for existing candidates to try out the Quartic experience.

The latest dates can be found at [www.quartic.co/cfastartup](http://www.quartic.co/cfastartup)

“

My experience with Quartic was great. Quartic resources really helped me to save time and concentrate on the most important content of the CFA Curriculum that is necessary to pass the exam. I would definitely recommend Quartic.

Izabela  
Allianz Global Investors

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\*Terms and Conditions apply



# Quartic



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