



# A CLEAR UNDERSTANDING OF THE INDUSTRY

## IS CFA INSTITUTE INVESTMENT FOUNDATIONS RIGHT FOR YOU?

Investment Foundations is a certificate program designed to give you a clear understanding of the investment management industry. Whether you're just starting a career in financial services or want to learn essential industry concepts, Investment Foundations offers an accessible solution for breaking through the complexities of the global investment industry and raising your professional profile.

## THE BIG PICTURE

Investment Foundations is a comprehensive global education certificate program that provides a clear understanding of investment industry essentials. The certificate program is designed for all professional disciplines outside of investment roles, including IT, operations, accounting, administration, and marketing. There is no education or experience requirement and the exam can be taken at your convenience at available test centers around the world.

## WHAT YOU LEARN

The certificate program covers the essentials of the investment management industry:



**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 WILL YOU BENEFIT



### Clarity

Benefit from having a common understanding of industry structure and terminology, regardless of your job function or geographic location.



### 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 global industry at large.

*"[CFA Institute Investment Foundations] is very relevant to the current market and I can study on the move. The program cleared up a lot of concepts for me and now I am much more comfortable speaking with clients about what is happening in the market."*

**MITALI BHANDARE**  
MORNINGSTAR,  
INVESTMENT FOUNDATIONS  
CERTIFICATE HOLDER

*"The main benefit of [CFA Institute Investment Foundations] was an ability to see a bigger picture of the finance industry and the role of our business within it."*

**ALEXANDER TARASOV**  
CITCO FUND SERVICES,  
INVESTMENT FOUNDATIONS  
CERTIFICATE HOLDER

## HOW TO FIND OUT MORE

Go to: [cfa.is/InvFound](http://cfa.is/InvFound)