



Join the IMC Panel

No of new member volunteers	3 - 5
Timeframe	1 year term
Commitment	40 – 50 hours across the timeframe
Reports to:	IMC Panel Chair

The profession's benchmark entry-level qualification, the IMC is used by leading investment firms to demonstrate competence for regulatory purposes. The IMC offers an excellent foundation to careers in the investment profession. Many IMC holders continue their professional development by studying for the Chartered Financial Analyst (CFA) Program. The IMC is an FCA Appropriate Qualification for the activity of 'Managing Investments'. CFA UK is the Awarding Organisation for the IMC qualification.

With over 5,000 exams sat each year, the Investment Management Certificate (IMC) is the most widely-recognised and established qualification of its kind in the UK. The IMC has been used by investment professionals for over 20 years, and is taken by staff in leading investment firms in the UK and overseas.

Who are we looking for:

IMC candidates come from a broad range of backgrounds with equally broad aspirations. It is generally considered appropriate for anyone entering an investment-related role. Developed for front office investment professionals, the main categories of employees who take the IMC are those involved in:

- Investment focused roles (portfolio manager, research analyst, trader, risk manager)
- Client management roles (wealth manager, private banker, relationship manager, sale)
- Middle office and support roles (IT, operations, project management).

We are currently looking for individuals with knowledge/experience of:

- Client Advice
- Taxation in the UK
- Regulation

Role of the Panel

The IMC Panel has three specific roles:

- To input into and determine the IMC syllabus
- To review and provide feedback on examination questions
- To review and provide feedback on the IMC study materials

In addition, the Panel reviews and oversees certain aspects of operational activity. This includes pass rates, assessment queries, and performance of test centres.



The IMC Panel is not responsible for the Ofqual regulatory compliance of the qualification. This is managed by the CFA UK Exams & Education committee.

What you will do

The IMC Panel is made up of approximately 15 to 20 individuals, with a range of different specialities and experience. New Panel members are assigned to become a Subject Matter Expert in one or more areas. The activities of a Panel member include:

- Review and feedback on syllabus (February) and attendance at two syllabus focused Panel meetings (March). Total time – 10 hours
- Review and feedback on new questions, and attendance at three Panel meetings to review and discuss these – 15 hours
- Review and feedback on examinations prior to release, and attendance at three Panel meeting to review and discuss these – 15 hours

In total, Panel members should be able to devote in the region of 40 to 50 hours a year to their activities. Panel meetings take place at CFA UK offices from 5.30pm to 7pm. The two meetings a year to discuss syllabus development are longer (5:30pm – 8pm).

Panel members are exposed to exam sensitive information and required to sign a confidentiality agreement.

What will you gain from volunteering with the IMC Panel

There are a range of benefits that come with joining the Panel.

- meet an interesting and engaged group of fellow practitioners from a range of sectors,
- obtain insight into qualification development and delivery, and
- help define and determine the requirements and set the competency standards for those entering the sector.
- be invited to a range of volunteer focused events.

If you are interested in applying for this opportunity, please download the Volunteer Application form and return it along with a copy of your CV to volunteer@cfauk.org

Deadline: Friday 8th June 2018