

CIMA[®]

CERTIFIED INVESTMENT MANAGEMENT ANALYST[®]

MANAGED BY



Portfolio
Construction
Forum

STRATEGIC PARTNER OF

CIMA Society 
of Australia
an affiliate of INVESTMENTS & WEALTH INSTITUTE

Enrolment - Australia & New Zealand

Please complete this form and return by email to mail@portfolioconstructionforum.edu.au (enrolments are considered in the order they are received).

Your Full Name:

Your Position:

Your Organisation:

Your Postal Address:

Your business email:

Your Phone:

Your Mobile:

Your personal email:

Are you paying the Enrolment Fee personally or is your firm?

1. Explain how and why you would benefit from completing the CIMA certification program.

CERTIFIED INVESTMENT MANAGEMENT ANALYST - AUSTRALIAN/NZ ENROLMENT

2. Outline your responsibilities in your current position.

3. Outline your prior education, study and any other certifications.

4. Outline your experience in the financial services industry.

5. How did you discover the CIMA certification program? If it was recommended, who by and how?

CERTIFIED INVESTMENT MANAGEMENT ANALYST - AUSTRALIAN/NZ ENROLMENT

Enrolment Fee and IMAC Booking

The Enrolment Fee ("Enrolment Fee") is payable to Portfolio Construction Forum by credit card on enrolment. The fee is A\$7,500+GST. Practitioners (as defined on cima.com.au) receive a \$2,500+GST CIMA Bursary on enrolment which will be applied by the Forum at the time of process of the enrolment fee, thereby reducing the fee to A\$5,000+GST. By submitting this Enrolment Form, you are agreeing to the enrolment terms and conditions below, and undertaking the Investment Management Analyst Certificate ("IMAC") course, the specialist executive education program for Australian and NZ candidates, from 12.30pm Saturday 18 April to 2.30pm Wednesday 22 April September 2020 inclusive. **Once accepted by Portfolio Construction Forum, your Enrolment Fee is non-refundable and non-transferable to any other IMAC.**

Card Type: Amex Visa Mastercard

Card #:

Name on Card:

Expiry Date:

CCV number:

Cardholder signature:

CIMA Certification Australian/NZ program enrolment terms and conditions

By registering for the CIMA certification Australian program ("the Program"), and to be granted the benefits described in under "Enrolment Fee and IMAC Booking" above, you acknowledge and agree that:

1. The Investments & Wealth Institute ("Institute") is the owner of the registered CIMA certification marks. In Australia and New Zealand, CIMA certification and accredited continuing education is managed and delivered by Portfolio Construction Forum ("the Forum"), the specialist, independent investment continuing education and certification service. The IMAC is part the Forum's Investment Management Research Program, the Registered Education Provider of the Institute in Australia and NZ.
2. You will invest the time required to study the CIMA curriculum and to complete the Program according to the study plan advice provided to you by the Forum.
3. The Enrolment Fee is payable to the Forum by credit card at the time of enrolment and is non-refundable and non-transferable to any other IMAC.
4. There is limited availability on each IMAC and enrolments will be considered in the order in which they are received.
5. The Enrolment Fee covers the cost of the Forum managing you through the CIMA certification process including: the process of applying to the Institute; preparing for and completing the IMAC (or which the Forum will provide you with the textbook, and online lectures to prep, as well as classroom components including lectures, review sessions, meals, and accommodation); and, preparing for the CIMA certification exam. All other expenses related to attending the IMAC including but not limited to any fees payable to the Institute are your responsibility.
6. The information collected about you in this form may be shared between the Forum, the Investment Management Research Program faculty and the Institute. Information about your progress through the Program will be shared between these parties for the purposes of facilitating your progress through the Program. If the Forum provides you with a Bursary, the Forum will advise the Forum CIMA Bursary Partners that it has done so and share your name, role and company. In addition, the Forum will advise CIMA Society of Australia ("CSoc") that you have enrolled in the Program. The Forum will also advise CSoc once you have successfully completed the Program.
7. You agree to disclose any information requested by the Forum regarding your progress through the Program and/or recertification process. You agree that you will advise the Forum of any correspondence from the Institute that relates to your progress through the Program. In addition, you hereby request that the Institute informs the Forum when the Institute notifies you of your official acceptance into the Program, when you complete the initial certification requirements, and your progress in completing the ongoing recertification requirements.

Name:

Signature:

Date:
