

CIMA[®]

CERTIFIED INVESTMENT
MANAGEMENT ANALYST[®]

stand for

more

knowledge

skill

expertise

Are you involved in any aspect of
constructing multi-manager portfolios?

If so, **Certified Investment Management Analyst (CIMA) certification** offers an unrivalled opportunity to formally equip yourself with the knowledge, skill and expertise to build better quality investment portfolios – and be recognised for it.

CIMA certification is the peak, international technical portfolio construction certification program designed for investment management analysts – that is, those involved in any aspect of constructing multi-manager portfolios, whether practitioner or advocate.

Find out more and enrol
visit **CIMA.com.au**

MANAGED BY



Portfolio
Construction
Forum

STRATEGIC PARTNER OF

CIMA Society 
an affiliate of INVESTMENTS & WEALTH INSTITUTE

SUPPORTED BY FORUM CIMA BURSARY PARTNERS

Aberdeen Standard Investments, AMP Capital, BlackRock, Colonial First State Global Asset Management, Fidelity International, Colonial First State Investments, Franklin Templeton Investments, Freehold Investment Management, Lazard Asset Management, Magellan Asset Management, Nikko Asset Management, Perpetual, Schroders, T. Rowe Price, UBS Asset Management

Today more than ever, quality investment portfolio construction requires a commitment to best practice continuing education and certification, because the investment world is ever changing and – entirely reasonably – individual investors are expecting and relying on superior professional standards to be met by those who design, build and manage their investment portfolios, to help them achieve their life goals and financial wellbeing.

CIMA certification is for investment management analysts...

CIMA certification fits uniquely in the clear and uncluttered space between the CFA program – which is perhaps best suited to those who primarily design portfolios of individual securities – and the CFP program – which is perhaps best suited to those who give broad-based financial planning advice.

In other words, CIMA certification is specialised to the space between CFA and CFP, and is ideally suited to investment management analysts - that is, those involved in any aspect of constructing multi-manager portfolios, whether practitioner or advocate.

For Practitioner investment management analysts:

- investment advisers, researchers/analysts and portfolio managers from private wealth management companies;
- analysts and asset consultants from fund research and fund investment consulting firms;
- researchers/analysts and portfolio managers from multi-manager funds management, superannuation and investment platform companies.

For Advocate investment management analysts:

- funds management professionals who work with practitioner investment management analysts.

CIMA certification has earned third-party accreditation by American National Standards Institute (ANSI). This distinguishes CIMA certification as the only financial services certification in the USA to meet international standards (ISO 17024) for personnel certification.

Portfolio Construction Forum, Investments & Wealth Institute, & CIMA Society...

In Australia and NZ, CIMA certification and accredited continuing education is managed and delivered by Portfolio Construction Forum, the specialist, independent investment continuing education and certification service. The CIMA certification mark is owned by the Investments and Wealth Institute™, the Denver USA-based, international professional association, advanced education provider, and certification board for financial advisers, investment consultants, and wealth managers. CIMA certificants in Australia and NZ are members of the CIMA Society of Australia, an affiliate of the Institute.

That's why CIMA certificants stand for more - more knowledge, more skill, more expertise - when it comes to designing, building and managing multi-manager portfolios.

Stand for more with CIMA certification! To find out more and enrol, visit CIMA.com.au

The CIMA curriculum covers five core Knowledge Domains

- 1. Fundamentals**
Statistics & Methods; Applied Finance & Economics; Global Capital Markets History & Valuation
- 2. Investments**
Investment Vehicles; Equity; Fixed Income; Alternative Assets; Options/Futures/Other derivatives; Real Assets
- 3. Portfolio Theory and Behavioural Finance**
Portfolio Theories & Models; Behavioral Finance Theory; Investment Philosophies & Styles; Tools & Strategies
- 4. Risk and Return**
Risk; Risk Measurements; Performance Measurement and Attribution
- 5. Portfolio Construction and Consulting Process**
Code of Professional Responsibility; Client Discovery; Investment Policy; Portfolio Construction; Manager Search, Selection, and Monitoring; Portfolio Review and Revisions

All CIMA candidates globally complete the same process including five key steps...

- 1. Enrol** - In Australia and NZ, Portfolio Construction Forum manages candidates through the process.
- 2. Ethics** – disclose any potential or real violations of the Code of Professional Responsibility and successfully complete background checks.
- 3. Education** – successfully complete a local, specialist executive education program. In Australia and NZ, this is the blended online and residential Investment Management Analyst Course (IMAC) culminating in a four-hour exam. Delivered by Portfolio Construction Forum, the IMAC features a faculty of academics from leading Australian university business schools, independent consultants and experienced practitioners.
- 4. Examination** – successfully complete the online, five-hour CIMA Certification Exam.
- 5. Experience** – exhibit at least three years of relevant experience in financial services.