

CONTINUING EDUCATION, ACCREDITATION & CERTIFICATION 2019 & 2020

Knowledge Domains

P = Philosophy

M = Markets

S = Strategies

I = Investing

F = Finology



Program	Program description	KD^	2019	2020
Blended (live and online)				
- Markets Summit (Syd)	Debating the drivers of and outlook for the markets	M	19 Feb	18 Feb
- Finology Summit (Syd)	Exploring investing beliefs, biases and behaviours	F	20-21 Feb	19-20 Feb
- Investment Mgmt Analyst Cert (Syd)	Advancing investment mgmt. analyst expertise	M, S, I	03-06 Mar	15-18 Mar
- Research Roundtable (Mel/Syd)	Building investment committee knowledge & skills	I	02/03 Apr	28/29 Apr
- Investment Mgmt Rsh Workshop (Syd)	Advancing investment management research	M, S, I	15 May	13 May
- Research Roundtable (Syd/Mel)	Building investment committee knowledge & skills	I	23/24 Jul	21/22 Jul
- Strategies Conference (Syd)	Debating portfolio construction strategies	S	21-22 Aug	19-20 Aug
- Investment Mgmt Analyst Cert (Syd)	Advancing investment mgmt. analyst expertise	M, S, I	8-11 Sep	06-09 Sep
- Research Roundtable (SF/LA)	Building investment committee knowledge & skills	I	19-26 Oct	-
- Research Roundtable (UK)	Building investment committee knowledge & skills	I	-	17-24 Oct
- Investment Mgmt Rsh Symposium (Syd)	Advancing investment management research	M, S, I	20-21 Nov	18-19 Nov
- Research Roundtable (Syd/Mel)	Building investment committee knowledge & skills	I	26/27 Nov	24/25 Nov
Online only				
- Perspectives	Debating contemporary portfolio construction issues	P, M, S, I, F	Continuous	Continuous
- Accreditation	Submitting content for independent CE accreditation	P, M, S, I, F	Continuous	Continuous
- CIMA® Certification	Certifying investment management analyst expertise	M, S, I	Continuous	Continuous

FIVE KNOWLEDGE DOMAINS

1

Philosophy

developing a contemporary and defensible investment portfolio construction belief set

2

Markets

understanding the drivers of and outlook for the investment markets

3

Strategies

designing robust investment strategies to meet defined objectives

4

Investing

identifying quality investment management solutions and their place in portfolios

5

Finology

exploring beliefs, biases and behaviours around investing



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Continuing Education programs

- Markets Summit (Syd)
- Strategies Conference (Syd)
- Research Roundtable (Mel/Syd/USA/UK)
- Finology Summit (Syd)
- Investment Mgmt Rsh Workshop (Syd)
- Investment Mgmt Rsh Symposium (Syd)

- Debating the drivers of & outlook for the markets
- Debating portfolio construction strategies
- Building investment committee knowledge & skills
- Exploring investing beliefs, biases and behaviours
- Advancing investment management research
- Advancing investment management research

- Auditorium Blended
- Auditorium Blended
- Roundtable Blended
- Auditorium Blended
- Classroom Blended
- Classroom Blended



Continuing Education subscriptions

- farrelly's Investment Strategy
- Delta Factors
- Zenith Know Your Product
- Perspectives

- Applying a dynamic approach to asset allocation
- Understanding investment performance behavior
- Helping meet Know Your Product obligations
- Debating contemporary portfolio construction issues

- Subscription Online
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- Subscription Online



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Continuing Education certificate courses

- Principles of Portfolio Philosophy Certificate
- Investment Mgmt Analyst Certificate (Syd)
- Principles of Finology Certificate
- Fund'ls of Portfolio Construction Certificate

- Developing robust portfolio construction beliefs
- Advancing investment mgmt. analyst expertise
- Exploring investing beliefs, biases and behaviours
- Building portfolio construction knowledge

- Course Online
- Course Blended
- Course Online
- Course Online



Accreditation service

The Forum's continuing education programs and courses, and those of selected firms (Forum CE Affiliates) are assessed and accredited by the Forum for CE hours that can be used to help meet the CE/CPD requirements of 15 regulators, associations, institutes and designations – including ASIC, FASEA, CFA, CIMA and CFP, where the content is appropriate. Following the event, delegates receive an email explaining the simple steps to ensure they receive CE hours.

Certifications

- Certified Portfolio Philosophy™
- Certified Investment Management Analyst®

- A certified robust portfolio construction belief set
- The peak int'l portfolio construction certification

- Course Online
- Course Blended

