

# OUR CONTINUING EDUCATION CALENDAR: MAR 2025 – FEB 2026

## Curriculum Knowledge Domains^

- Strategies
- Investment Factors
- Markets
- Investing
- Human Factors
- Finology
- Philosophy

## Delivery

- LSS: Live studio (Sydney)
- LSH: Live site (hosted)
- LSO: Live stream (online)
- ODO: On demand (online)



KD^	Continuing Education	Description	Date	Delivery
●	<b>Programs (live &amp; on demand)</b> Markets Summit (Syd) *	Debating the drivers of and outlook for the markets	25 Feb 2026	LSS/LSH/LSO, ODO
●●●●●	Strategies Summit (Syd) *	Debating portfolio construction strategies	20-21 Aug 2025	LSS/LSH/LSO, ODO
●	Research Symposium (Syd) **	Exploring contemporary investment research issues	20 May 2025	LSS
●	Research Roundtable Intl (UK) **	Building fund research knowledge and skills	05-12 Apr 2025	LSH
●	Research Roundtable (AU/NZ) **	Building fund research knowledge and skills	through the year	LSO, ODO
●●●●●	CIMA Connect Zoom / Dinner **	Exploring contemporary portfolio construction issues	16.05, 10.10 / 20.11	LSO
	<b>portfolioconstructionforum.edu.au Library (on demand)</b>			
	<b>- Perspectives - Videos, podcasts &amp; papers#</b>			
●●●●●	Viewpoint	Presenting contemporary portfolio construction views	Continuous	ODO
●	Research Spotlight	Presenting quality investment management solutions	Continuous	ODO
●●●	Rich Pickings – Meet the Inv Mgr	Profiling portfolio managers' background and beliefs	Continuous	ODO
●●●●●	Thinking Differently – Up front	Profiling outside-the-box, independent thinkers	Continuous	ODO
	<b>- Courses</b>			
●●●●●	Short Courses	Advancing robust portfolio construction beliefs	Continuous	ODO
●●●●●	BeFi Invmt Decision-Making Cert	Examining human preferences that shape investment	Continuous	ODO
●●●●	Investment Mgmt Analyst Cert^	Advancing investment management analyst expertise	03 Mar-26 Sep	LSO/ODO

\* Live studio series, open invitation    \*\* Invitation only    ^ Pre-requisite for CIMA certification

# OUR CONTINUING EDUCATION CALENDAR: MAR 2025 – FEB 2026

## Curriculum Knowledge Domains^

- Strategies
- Investment Factors
- Markets
- Investing
- Human Factors
- Finology
- Philosophy

## Delivery

- LSS: Live studio (Sydney)
- LSH: Live site (hosted)
- LSO: Live stream (online)
- ODO: On demand (online)



KD^	Continuing Education (cont'd)	Description	Date	Delivery
●	<b>- Subscriptions</b> Portfolio Compass	Design and analyse portfolio asset allocations	Continuous	ODO
●●	farrelly's Investment Strategy	Applying a dynamic approach to asset allocation	Continuous	ODO
●●●	Delta Factors	Understanding fund performance behaviour	Continuous	ODO
●●●●	CIMA CE Library	Earn accredited hrs to meet CIMA CE requirements	Continuous	ODO
●●●●	<b>Tools</b> CE Library *	Earn accredited hours to meet CE requirements	Continuous	ODO
●●●●	MyCE *	Store, view, print, export multi-designation CE record	Continuous	ODO
●●●●	MyStudyPlan	Manage your progress on courses and certificates	Continuous	ODO
●●●●	<b>Member communications</b> Forum Fodder *	Highlighting latest food for thought from the Forum	Weekly	Email
●●●●	CE Quarterly *	Highlighting live & on demand CE-accredited resources	Quarterly	Email
●●●●	CIMA Circular	Highlighting issues relevant to CIMA Society members	Quarterly	Email
●●●●	<b>Accreditation Service – MyCE Submissions</b> The Forum provides an independent, best-practice, auditable CE accreditation service for our own and other firms' (we call them CE Accreditation Partners) continuing education learning activities.			
●●●	<b>Certification</b> Certified Inv Mgmt Analyst^	Peak int'l technical portfolio construction certification	Continuous	LSO, ODO

\* Complimentary to all members    ^ Pre-requisite for CIMA certification