# OUR CONTINUING EDUCATION CALENDAR: 1 JAN 2026 - 31 DEC 2026

## Curriculum Knowledge Domains^

StrategiesInvestment 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	
	Programs (live & on demand)				
•	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	19-20 Aug 2026	LSS/LSH/LSO, ODO	
• • •	Mercer Pvt Mkts & Alts Mclass **	Exploring role of private markets & alts in portfolios	15 Sep 2026	LSH	
• • •	Pvt Mkts & Alts Intl Course (US) **	Building investment solution knowledge and skills	02-09 May 2026	LSH	
•	Research Symposium (Syd) **	Exploring contemporary investment research issues	03 Jun 2026	LSS	
•	Research Roundtable (AU/NZ) **	Building fund research knowledge and skills	through the year	LSO, ODO	
• • • •	CIMA Connect Zoom **	Exploring contemporary portfolio construction issues	23.07, 24.09 / 26.11	LSS/LSO / LSS	
	portfolioconstructionforum.edu.au Library (on demand)				
	- Perspectives - Videos, podcas				
• • • •	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	
	- Courses				
•	BeFi Invmt Decision-Making Cert	Examining human preferences that shape investment	Continuous	ODO	
• • •	Investment Mgmt Analyst Cert ^	Advancing investment management analyst expertise	Mar - Sep	LSO/ODO	

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

# OUR CONTINUING EDUCATION CALENDAR: 1 JAN 2026 - 31 DEC 2026

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

### Curriculum Knowledge Domains^

StrategiesInvestment 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		
	- Subscriptions & Tools					
• •	Thinking Differently About Mkts	Understanding how economies & markets really work	Continuous	LSO, ODO		
•	Evergreen Portfolio Compass	Connecting portfolios to client objectives	Continuous	ODO		
• •	Delta Dynamic Asset Allocation	Applying a dynamic approach to asset allocation	Continuous	ODO		
•	Delta Factors	Understanding fund performance behaviour	Continuous	ODO		
• • • •	CE Library *	Earning accredited hours to meet CE requirements	Continuous	ODO		
• • • •	CIMA CE Library	Earning accredited hrs to meet CIMA CE requirements	Continuous	ODO		
	MyCE *	Storing, viewing, printing, and exporting CE earned	Continuous	ODO		
	MyStudyPlan	Managing your progress on courses and certificates	Continuous	ODO		
	Member communications					
• • • •	Forum Fodder *	Highlighting latest food for thought from the Forum	Weekly	Email		
• • • •	CE Quarterly *	Highlighting CE-accredited resources	Quarterly	Email		
	CIMA Circular	Highlighting issues relevant to CIMA Society members	Quarterly	Email		
	Accreditation Service – MyCE Submissions					
• • • •	or our own and our F	Partners' continuing				
	Certification					
• • •	Certified Inv Mgmt Analyst ^	Peak int'l technical portfolio construction certification	Continuous	LSO, ODO		