

OUR CONTINUING EDUCATION CALENDAR: 1 JUL 2025 – 30 JUN 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
	Programs (live & on demand)			
● ● ● ● ●	Strategies Summit (Syd) *	Debating portfolio construction strategies	20-21 Aug 2025	LSS/LSH/LSO, ODO
● ● ●	Mercer Pvt Mkts & Alts Mclass **	Exploring role of private markets & alts in portfolios	15 Sep 2025	LSH
● ● ●	Pvt Mkts & Alts Intl Mclass (US) **	Exploring role of private markets & alts in portfolios	11-18 Oct 2026	LSH
●	Markets Summit (Syd) *	Debating the drivers of and outlook for the markets	25 Feb 2026	LSS/LSH/LSO, ODO
●	Research Symposium (Syd) **	Exploring contemporary investment research issues	19 May 2026	LSS
●	Research Roundtable Intl (US) **	Building fund research knowledge and skills	18-25 Apr 2026	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	11.07 & 27.11 / 27.11	LSS/LSO / LSS
	portfolioconstructionforum.edu.au Library (on demand)			
	- Perspectives - Videos, podcasts & papers#			
● ● ● ● ●	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

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

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	- 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			
● ● ● ● ●	The Forum provides an independent, best-practice, auditable CE accreditation service for our own and our Partners' continuing education learning activities.			
	Certification			
● ● ●	Certified Inv Mgmt Analyst ^	Peak int'l technical portfolio construction certification	Continuous	LSO, ODO

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