

# OUR CONTINUING EDUCATION CALENDAR: 1 JUL 2024 – 30 JUN 2025

## 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

### Programs (live)

- Strategies Conference (Syd)
- Research Symposium (Syd)#
- Markets Summit (Syd)
- Research Roundtable Intl (USA)
- Finology Summit (Syd)
- Research Roundtable#

### portfolioconstructionforum.edu.au multi-media library (on demand)

#### - Videos, podcasts & papers

- Viewpoints\*\*
- Profiles\*\*

#### - Courses

- Investment Mgmt Analyst Cert^
- BeFi Investment Decision-Making
- Philosophy Lectures\*\*

#### - Subscriptions

- farrelly's Investment Strategy
- Delta Factors

## Description

- Debating portfolio construction strategies
- Exploring contemporary investment research issues
- Debating the drivers of and outlook for the markets
- Building fund research knowledge and skills
- Exploring human factors in portfolio construction
- Building fund research knowledge and skills

- Presenting contemporary portfolio construction views
- Profiling portfolio manager beliefs and behaviours

- Advancing investment management analyst expertise
- Examining human preferences that shape investment
- Advancing robust portfolio construction beliefs

- Applying a dynamic approach to asset allocation
- Understanding investment performance behaviour

## Date

- 21-22 Aug
- 21 Nov
- 19 Feb
- 29 Mar – 05 Apr
- 07 May
- Jul, Sep, Mar, May®

- Continuous
- Continuous

- 13 Mar-08 Sep
- Continuous
- Continuous

- Continuous
- Continuous

## Delivery

- LSS/LSH/LSO, ODO
- LSS
- LSS/LSH/LSO, ODO
- LSH
- LSS/LSH/LSO, ODO
- LSO, ODO

- ODO
- ODO

- LSO/ODO
- ODO
- ODO

- ODO
- ODO

# OUR CONTINUING EDUCATION, ACCREDITATION & CERTIFICATION CALENDAR

## Curriculum Knowledge Domains^

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

## Delivery

- LSS: Live studio (Sydney)
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- LSO: Live stream (online)
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## Continuing Education (cont'd)

### Tools

- CE Library\*\*
- CIMA CE Library#
- MyCE\*\*
- MyFBI#
- MyStudyPlan

### Member communications

- Forum Fodder\*\*
- CE Quarterly\*\*

### Accreditation Service

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, including live (face-to-face and online) and on-demand activities. The Forum's best practice, multi-designation CE/CPD accreditation service: **accredits** learning activities for CE/CPD hours that can be used to help meet the requirements of 20+ governing bodies (regulators, associations, and institutes) – including ASIC, APRA, and Legislated (AU), CIMA®, FAAA, and FMA CE/CPD requirements; **tests and confers** CE hours to those who participate in accredited live and on-demand continuing education activities; and **enables members to store, view, print and export their CE record 24/7** via the Forum's MyCE, as well as their own or third party CPD (i.e. non-Forum accredited).

### Certification

- Certified Inv Mgmt Analyst^

## Description

- Earn accredited hours to meet CE requirements
- Earn accredited hrs to meet CIMA CE requirements
- Store, view, print, export multi-designation CE record
- Benchmark your investing biases, beliefs & behaviours
- Manage your progress on courses and certificates
- Highlighting latest food for thought from the Forum
- Highlight live & on-demand CE-accredited resources

## Date

- Continuous
- Continuous
- Continuous
- Continuous
- Continuous
- Weekly
- Quarterly

## Delivery

- ODO
- ODO
- ODO
- ODO
- ODO
- Email
- Email

