

OUR CONTINUING EDUCATION CALENDAR: 1 JAN – 31 DEC 2024

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)			
●	Markets Summit (Syd)	Debating the drivers of and outlook for the markets	21 Feb	LSS/LSH/LSO, ODO
●	Research Roundtable Intl (USA)	Building fund research knowledge and skills	16–23 Mar	LSH
● ●	Finology Summit (Syd)	Exploring human factors in portfolio construction	01 May	LSS/LSH/LSO, ODO
● ● ●	Strategies Conference (Syd)	Debating portfolio construction strategies	21–22 Aug	LSS/LSH/LSO, ODO
● ● ●	Research Symposium (Syd)#	Exploring contemporary investment research issues	21 Nov	LSS
●	Research Roundtable#	Building fund research knowledge and skills	Mar, May, Jul, Sep®	LSO, ODO
	portfolioconstructionforum.edu.au multi-media library (on demand)			
	- Videos, podcasts & papers			
● ● ● ● ●	Viewpoints**	Presenting contemporary portfolio construction views	Continuous	ODO
● ●	Profiles**	Profiling portfolio manager beliefs and behaviours	Continuous	ODO
	- Courses			
● ● ●	Investment Mgmt Analyst Cert^	Advancing investment management analyst expertise	13 Mar–08 Sep	LSO/ODO
● ● ●	BeFi Investment Decision-Making	Examining human preferences that shape investment	Continuous	ODO
● ● ●	Philosophy Lectures**	Advancing robust portfolio construction beliefs	Continuous	ODO
	- Subscriptions			
● ●	farrelly's Investment Strategy	Applying a dynamic approach to asset allocation	Continuous	ODO
●	Delta Factors	Understanding investment performance behaviour	Continuous	ODO

OUR CONTINUING EDUCATION, ACCREDITATION & CERTIFICATION CALENDAR

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KD^



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



- Peak int'l technical portfolio construction certification

- Continuous

- LSO, ODO