

OUR CONTINUING EDUCATION CALENDAR: 1 JAN 2025 – 31 DEC 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	Description	Date	Delivery
●	Programs (live & on demand) Markets Summit (Syd) *	Debating the drivers of and outlook for the markets	19 Feb 2025	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	21 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
	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 PM	Profiling portfolio managers' background and beliefs	Continuous	ODO
● ● ● ● ●	Thinking Differently – Up front	Profiling outside-the-box, independent thinkers	Continuous	ODO
	- Courses			
● ● ● ● ●	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, ACCREDITATION & CERTIFICATION CALENDAR

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KD^	Continuing Education (cont'd)	Description	Date	Delivery
●	- Subscriptions 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
●●●●	Tools 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
●●●●	Member communications 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
●●●●	Accreditation Service – MyCE Submissions 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.			
●●●	Certification Certified Inv Mgmt Analyst^	Peak int'l technical portfolio construction certification	Continuous	LSO, ODO

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