

# CFA<sup>®</sup> PROGRAM 2025

## CHARTERED FINANCIAL ANALYST

- **LEADING GLOBAL PROVIDER**  
Top provider in offering all 3 levels of CFA Program training in Hong Kong  
Proven track record and experience over 50 locations
- **EXPERT TRAINERS**  
Satisfaction Rate of Trainer  $\geq 90\%$
- **FREE REJOIN PASS<sup>^</sup>**  
Chance to rejoin same level CFA course within 6 months
- **LIVE STREAMING**  
Let you attend the class in real time from anywhere
- **ONLINE CATCH-UP VIDEO**  
Free access to our eLearning platform to review the lessons anytime
- **PRE-REQUISITE READING VIDEO\***  
Course notes and videos are provided for foundation building

<sup>^</sup>Refer to Page 4.

\* Applicable for Level I student only.

Non-local course registration no. 360846

It is a matter of discretion for individual employers to recognize any qualification to which this course may lead.

(852) 2526 3686

(852) 2501 0589

[www.kaplan.com.hk/kfm](http://www.kaplan.com.hk/kfm)

[hkcfa@kaplan.com](mailto:hkcfa@kaplan.com)



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With Us Now!



Chartered Financial Analyst Program makes global standard for professionals in the financial sector, from which they gain investment knowledge and ethical principles. Earning a CFA® Charter you are one step ahead of becoming a financial professional.

## OVERVIEW

- Administered by CFA Institute since 1962
- Generalist study and exam program for investment professionals
- Three exams based on a practice-based curriculum that changes annually to meet nature and complexity of the global investment profession
- Focus on the knowledge essential to the investment decision-making process
- Recognized as the “gold standard” in the industry

### WHY DO THOUSANDS PURSUE THE CFA® CHARTER?



• Gold standard worldwide



• Career enhancing



• Essential knowledge



• Global network



## How to get the CFA® Charterholder?



### Enter the CFA® Program

#### Enrollment Requirements:

- Have a **bachelor's (or equivalent) degree**
- OR
- Your exam window **must be within 23 months** of your graduation month for bachelor's degree (or equivalent).
- OR
- Have a combination of **4,000 hours of work experience and/or higher education** that was acquired over a minimum of three sequential years<sup>^</sup>.
- A **valid international travel passport** to register is needed

STEP 1

\*Not necessary investment related  
^If applicable, assume 1,000 hours per year for higher education



### Become a CFA Charterholder

#### Requirements:

- 1 Passing the exam for all three levels along with the applicable Practice Skills Modules
- 2 Achieve Qualified Work Experience
- 3 Submit Reference Letters
- 4 Apply to Become a Charterholder

For details, please refer to CFA Institute official website:  
<https://shorturl.at/Qavyp>



STEP 2

## EXAM STRUCTURE

CFA Institute recommends minimum 300 hours of study time for each level. Your time commitment is critical to success. Kaplan CFA® Exam Prep will enhance your understanding of the materials but your commitment to out-of-classroom study is essential.

LEVEL I	LEVEL II	LEVEL III
2hrs 15mins per session	2hrs 12mins per session	2hrs 12mins per session
<b>Session 1</b> <b>90</b> MC questions	<b>Session 1</b> <b>44</b> MC questions in vignette format	<b>Session 1</b> <b>5-6</b> item sets & <b>5-6</b> essay sets
<b>Session 2</b> <b>90</b> MC questions	<b>Session 2</b> <b>44</b> MC questions in vignette format	<b>Session 2</b> <b>5-6</b> item sets & <b>5-6</b> essay sets
<b>Total 180</b> Multiple-Choice Questions	<b>Total 88</b> Multiple-Choice Questions	<b>Total 11</b> item sets + <b>11</b> essay sets

## TOPIC AREA WEIGHTS

EXAM TOPIC	LEVEL I	LEVEL II
Ethical and Professional Standards	15-20%	10-15%
Quantitative Methods	6-9%	5-10%
Economics	6-9%	5-10%
Financial Statement Analysis	11-14%	10-15%
Corporate Issuers	6-9%	5-10%
Equity Investments	11-14%	10-15%
Fixed Income	11-14%	10-15%
Derivatives	5-8%	5-10%
Alternative Investments	7-10%	5-10%
Portfolio Management	8-12%	10-15%

EXAM TOPIC	LEVEL III
Asset Allocation	15-20%
Portfolio Construction	15-20%
Performance Measurement	5-10%
Derivatives and Risk Management	10-15%
Ethical and Professional Standards	10-15%
Pathways* (Choose one of three specialized pathway)	30-35%
1. Portfolio Management Pathway	
2. Private Markets Pathway	
3. Private Wealth Pathway	



**Computer  
based**



► For details, please refer to CFA Institute:  
<https://www.cfainstitute.org/en/programs/cfa/exam>

## CFA EXAM COST & EXAM CYCLE

EXAM PERIOD	EXAM LEVEL	EARLY REGISTRATION PERIOD	REGISTRATION DEADLINE	EXAM DATES
FEB	I	May 9 - Jul 9, 2024	Nov 7, 2024	Feb 17-23, 2025
	III			Feb 13-26, 2025
MAY	I	Aug 8 - Oct 16, 2024	Feb 6, 2025	May 14-20, 2025
	II			May 21-25, 2025
AUG	I	Nov 6, 2024 - Jan 29, 2025	May 6, 2025	Aug 20-26, 2025
	II			Aug 27-31, 2025
	III			Aug 15-19, 2025
NOV	I	Feb 12 - Apr 9, 2025	Aug 5, 2025	Nov 12-18, 2025
	II			Nov 19-23, 2025

\*Candidates will choose one of three "specialized pathway" options at registration.

Candidates are reminded to always refer to the examination body's official website for the most updated information. Information contained herein about exam registration information is correct at the time of brochure publication and is provided "as is", without any conditions, warranties, or other terms of any kind.

Kaplan does not warrant the accuracy of the data which may be subject to changes.

# MOST EFFECTIVE 3-PHASE LEARNING APPROACH

EDUCATION 4 - 6 months before exam	REVISION 1 - 2 months before exam	MOCK 2 - 4 week before exam
Learn new facts, concepts, processes, procedures, and principles	Retain and remediate new knowledge through application	Evaluate retention and application of new knowledge
<b>14 - 20 Sessions</b> ⌚ 42-60 hrs	<b>9 Sessions</b> ⌚ 27 hrs	<b>Mock Exam</b> ⌚ 4 hrs 24-30 mins   <b>Mock Review</b> ⌚ 3 hrs

## LEARNING OUTCOMES

### Knowledge Building

- Cover all big-picture concept vital to understand CFA® Program curriculum and provide exam-related tips and tricks

### Simulation and Practice

- Concentrate on exam taking strategies and techniques
- Intensive exercises drilling with full debriefs
- Additional review of most difficult and tricky concepts

### Performance Measure

- Practice the skills and knowledge required in real exam
- Trainer's post-mock debrief

## LEARNING RESOURCES

### Education Program Slide Pack

- Prepared by our global faculty team, localized to suit HK students

### Pre-requisite Reading Course Notes (Level I only)

### Practice Questions

- End-of-topic Q&A (Level I only)

### Downloadable Course Materials

- Available in digital format and can be printed as needed for your convenience

### Pre-requisite Reading Course Notes (Level I only)

### Revision Mind Maps

- Mindmap to summarize key concepts at a glance

### Revision Questions Book

- Hundreds of exam-standard concept checkers

### Downloadable Course Materials

- Available in digital format and can be printed as needed for your convenience

### Exam-standard Mock Exam Questions

### Personalized Performance Reports

- Evaluate your performance, identify areas for improvement and priorities

### Graded Answer Sheet

- Including Essay Questions (Level III Only)



Enroll Full Package and get a set of 2025 Schweser Essential Package (Online) at discounted price

- Optional add-on at HK\$3,900 up (Original HK\$5,700 up)

## ONLINE ACCESS & SUPPORTING SERVICES

### Online Pre-Course (Level I only)

- Start early by watching approximate 9 hours of online instruction on fundamental concepts

### Pre-requisite Reading Video (Level I only)

### Online Progress Test

- 6 tests (Level I), 4 tests (Level II & III) scheduled at key milestones

### Live Streaming<sup>^</sup>

- We make learning super convenient that allow you attend the class in real time from anywhere at scheduled times

### Online Catch-up Video<sup>^</sup>

- All sessions are available to recap in our eLearning platform which allow you to review or make up missed session anytime anywhere

### Swap Class<sup>^</sup>

- Catch up missed lectures by swapping to another class
- 6 sessions (Level I), 5 sessions (Level II) and 4 sessions (Level III)

### Pre-requisite Reading Video (Level I only)

### Live Streaming<sup>^</sup>

- We make learning super convenient that allow you attend the class in real time from anywhere at scheduled times

### Online Catch-up Video<sup>^</sup>

- All sessions are available to recap in our eLearning platform which allow you to review or make up missed session anytime anywhere

### Swap Class<sup>^</sup> (2 sessions)

- Catch up missed lectures by swapping to another class

### Live Streaming<sup>^</sup>

- We make learning super convenient that allow you attend the class in real time from anywhere at scheduled times

### Online Catch-up Video<sup>^</sup>

- All sessions are available to recap in our eLearning platform which allow you to review or make up missed session anytime anywhere

## Private Tutoring Contact us for assessment and price quote



**Tailor made your own 1:1 or group tutoring with an expert trainer**



**More intensive and focused practice comparing to regular program**



**Customize your own schedule and study plan based on your needs**





# FREE REJOIN PASS

The CFA qualification can be tough to pass, but if you didn't get the result you wanted, all is not lost. We offer a Free Rejoin Pass for candidates studying with us.

## How it Works:



### Enroll CFA 2025 Full Package

You will receive a Free Rejoin Pass when you enroll our CFA Full Package.



### Sit For/ Postpone the Exam within the same exam window as the package you enrolled in

Not perform well or apply deferral for the exam?  
No worries! You can rejoin the course for free!



### Rejoin Our Course for FREE

You can rejoin the same level CFA course within 6 months\*!

## You are eligible to rejoin our course if you:



### You must meet the following criteria:

1. Enrolled in our **CFA 2025** Full Package; and
2. Submit Exam Fail Notice / Approved Deferral Proof from CFAI; and
3. Submit new Exam Registration Notice for the same level enrolled;
4. Complete the CFA Enrollment Form

\*The Free 6-month Rejoin Pass is valid for a period of six (6) consecutive months from the end of the online platform subscription date of the enrolled semester which is the end of the month after the exam of your enrolled semester.  
Terms and Conditions apply.

# TRAINER'S PROFILE



**Dr. Kyle Wong**

PhD(Cornell), CFA, FRM

- Over 16 years of experience in teaching CFA Level I, II and III
- Design, develop and deliver financial training programs to top financial institutions and MNCs
- Expertise in investment tools, risk management, financial analysis, hedge fund, structured products, portfolio management and wealth management
- Subject expert of CFA Level III essay questions
- Trainer of the first CFA Level III Essay Writing workshop in Hong Kong
- Currently Director of Kaplan's Financial Markets Division
- COO of Avant Capital Management, a greater China value focused hedge fund
- Columnist for i-Money Magazine
- Joined from DBS, where he was VP of Complex Hybrid Products. Prior to that, he held numerous executive positions at Merrill Lynch, HSBC, RBC, Citi in Canada, Singapore and Hong Kong

**Demo  
Lecture**



**Mr. Jonathan Lau**

BA Econ (Cambridge), CFA

- Investment specialist with over 12 years of experience in multi-asset investments
- Was Head of Research for 7 years at Brooks Macdonald Asset Management based in London with over US\$13bn in assets under management
- Co-chaired the Asset Allocation Committee that oversaw the investment process, fund selection and macro research strategy
- Prior to that, held positions in Deutsche Bank's corporate team and IFG, a financial services company, where he managed pension funds
- Passionate trainer who will share tips from his experience in passing all three levels of the exam in one-go

**Demo  
Lecture**



**Mr. J. Lam**

MSc Financial Mathematics (HKUST), CFA, CFA Cert. in ESG Investing

- Over 15 years of experience in the financial industry in multi-asset classes, including equities, derivatives, and convertibles
- An expert in portfolio management, risk management, hedge fund, and structured products
- Held senior positions at numerous asset management firms, where he managed equity asset portfolios
- A passionate trainer, with extensive experience in valuation, financial statements, and risk management, who can distill complex concepts into simple ideas

**Demo  
Lecture**



## WHAT OUR STUDENTS SAY

**96%**  
of our STUDENTS said  
Kaplan's CFA® exam  
preps useful

Hear what our  
students say



I found that Kaplan's prep course for the CFA® program is incredibly helpful for a number of reasons. Most importantly, we had a great teacher - engaging, enthusiastic, helpful, and highly exam-focused.

I'm also grateful for his detailed, step-by-step approaches in teaching us how to answer exam questions. Also, the catch-up videos were very helpful for reviewing concepts and catching things I had missed in class!

**Sarah Peterson**  
Level I & II Alumni

## ONLINE STORE SPECIAL

**EXTRA \$300 OFF**

(Limited Offer) with promotional code:

MAY

**CFA2025MAY**

AUG

**CFA2025AUG**

NOV

**CFA2025NOV**



Enroll Now



## WIN-WIN REFERRAL PROGRAM

Get **\$1,000 up** together



Know More



## FREE WELCOME GIFT

Register with Customer Service and follow our channels now!

Facebook: **kfmhk**

Instagram: **kaplanhk\_fm**



**SOCIAL MEDIA**

**OFFER**

## Upon successful enrollment (Full Package) Start your preparation before class commencement

1

### Online pre-course

Enroll Full Package for our exclusive online pre-course features:

#### Level I only

Approximate 9 hours of online instruction on Fundamental Financial Reporting, Financial Maths, Basic Economics and BAII+ Calculator tips

2

### Add-on Schweser Essential Package at discounted price



Scan QR code ▶

For course material availability



# FAQ

## Q1 Is your course suitable for me if I don't have solid background in Finance? Will it be difficult for me to catch up in class?

Our most complete 3-Phase learning strategy (Education + Revision + Mock Exam) for the CFA® Program, known as **Full Package** is the most comprehensive training in Hong Kong. We not only help you build core concepts but also take it further by enhancing exam techniques and rehearsing exam.

For students who do not have background in business nor strong financial knowledge, we offer **Free Online Pre-course** for those who enroll in our Level I Full Package. Approximate 9 hours of online instruction on fundamental concepts helps you build a solid foundation and acquire key skills required to ensure a smooth start.

We also recommend you to begin your CFA® Program journey with our **Free Resources**, including CFA® Fundamental eBook, Calculator Workshop etc. For details, please refer to <https://fmlanding.kaplan.com.hk/>.

## Q2 Will you help me register the exam?

You are responsible for registration of the CFA® exam. If you have not done so, you can register online at: **[www.cfainstitute.org/programs/cfa/register](http://www.cfainstitute.org/programs/cfa/register)**. Please beware of the exam registration deadline indicated on CFA Institute Official Website.

## Q3 How long should I prep the exam?

The CFA® exam is tough, CFA Institute recommends **minimum of 300 hours** of study time for each level. Instead of expending more energy and time trying to figure out the complexities of the curriculum, outsource it to a professional like Kaplan. So you can study more efficiently. Our most complete CFA® Program 3-Phase learning strategy (Education + Revision + Mock Exam) includes everything you need to maximize study effectiveness. The duration of our program takes 3 to 5 months to get you exam-ready.

## Q4 I may not be able to attend some of the sessions. What should I do?

Don't worry, we have the best solution for you. Our Online Catch-up Videos are here to prevent you from missing any classes. Contact our Customer Service Officer and request:

### Catch-up Videos

Education Program, Revision Course, Mock Review with trainer annotations is recorded and available for viewing anywhere with internet access

## Q5 Which trainer is better?

Any educational program is only as good as the people who construct and deliver it. We have assembled the most effective, well-respected, and competent team of professional trainers to create and deliver Kaplan Exam Prep.

To learn more of their teaching styles and how trainers work through problems, you are welcome to attend our free seminars. For dates of upcoming seminars and to register, please visit: **[www.kaplan.com.hk/financial-markets/events](http://www.kaplan.com.hk/financial-markets/events)**.

## Q6 Which study solution is right for me?

Majority of people would prefer following a pre-set schedule, interacting with trainer and participants, learning in a classroom environment. **Our Full Package** has helped thousands of candidates to prepare for the exam effectively.

If you are juggling between career and study which makes attending classroom class almost impossible, with our **Live-streaming and Online Catch-up video service**, or **Kaplan Schweser Self-study Package**, you have the freedom and flexibility to decide what fits your learning style and condition.

## Q7 Any pass guarantee?

We understand that the qualification can be tough to pass, if you don't get the result you wanted, not all is lost. Therefore we offer free rejoin pass for you. Details please refer to Page 4.

## Q8 I think your program is quite expensive. May I know why I should choose Kaplan for preparing my CFA® exam?

We offer one of the **highest number of hours** of training program in Hong Kong. Designed around a 3-Phase learning strategy (Education + Revision + Mock), all our courses are guided by academic researches on the most effective study method to prepare for the exam. Many providers stop in the Education Phase. We take it further by enhancing exam techniques and rehearsing exam in the Revision Course and Mock Exam.

## Q9 I want to know more about the exam. Where can I find more information?

### Hong Kong Office

27/F, Henley Building, 5 Queen's Road Central  
Hong Kong  
Tel: 8009 60799  
24-hour Info: 8228 8820

### Head Office in US

Email: [info@cfainstitute.org](mailto:info@cfainstitute.org)  
Tel: +1 (434)951-5499  
Fax: +1 (434) 951-5262  
Website: [www.cfainstitute.org](http://www.cfainstitute.org) (login to submit inquiry at website)



# CFA LEVEL I - COURSE SCHEDULE

LEVEL

FEB

## EDUCATION PROGRAM

60 hours

20 sessions

TRAINER >	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up						
	KYLE WONG CANTONESE			JONATHAN LAU ENGLISH			
	DATE	DAY	TIME	DATE	DAY	TIME	
1 Quantitative Methods**	20/10/24	Sun	10:00 - 13:00	12/10/24	Sat	10:00 - 13:00	
2 Quantitative Methods	20/10/24	Sun	14:00 - 17:00	12/10/24	Sat	14:00 - 17:00	
3 Quantitative Methods + Online Progress Test Release	23/10/24	Wed	19:00 - 22:00	19/10/24	Sat	10:00 - 13:00	
4 Financial Statement Analysis**	27/10/24	Sun	10:00 - 13:00	19/10/24	Sat	14:00 - 17:00	
5 Financial Statement Analysis	27/10/24	Sun	14:00 - 17:00	26/10/24	Sat	10:00 - 13:00	
6 Financial Statement Analysis	03/11/24	Sun	10:00 - 13:00	26/10/24	Sat	14:00 - 17:00	
7 Financial Statement Analysis + Online Progress Test Release	03/11/24	Sun	14:00 - 17:00	02/11/24	Sat	10:00 - 13:00	
8 Portfolio Management	06/11/24	Wed	19:00 - 22:00	02/11/24	Sat	14:00 - 17:00	
9 Portfolio Management + Corporate Issuers	10/11/24	Sun	10:00 - 13:00	09/11/24	Sat	10:00 - 13:00	
10 Corporate Issuers	10/11/24	Sun	14:00 - 17:00	09/11/24	Sat	14:00 - 17:00	
11 Equity	17/11/24	Sun	10:00 - 13:00	16/11/24	Sat	10:00 - 13:00	
12 Equity + Online Progress Test Release	17/11/24	Sun	14:00 - 17:00	16/11/24	Sat	14:00 - 17:00	
13 Fixed Income	20/11/24	Wed	19:00 - 22:00	23/11/24	Sat	10:00 - 13:00	
14 Fixed Income	24/11/24	Sun	10:00 - 13:00	23/11/24	Sat	14:00 - 17:00	
15 Fixed Income	24/11/24	Sun	14:00 - 17:00	30/11/24	Sat	10:00 - 13:00	
16 Derivatives	08/12/24	Sun	10:00 - 13:00	30/11/24	Sat	14:00 - 17:00	
17 Derivatives + Alternative Investments + Online Progress Test Release	08/12/24	Sun	14:00 - 17:00	07/12/24	Sat	10:00 - 13:00	
18 Economics**	11/12/24	Wed	19:00 - 22:00	07/12/24	Sat	14:00 - 17:00	
19 Economics + Online Progress Test Release	15/12/24	Sun	10:00 - 13:00	14/12/24	Sat	10:00 - 13:00	
20 Ethical and Professional Standards + Online Progress Test Release	15/12/24	Sun	14:00 - 17:00	14/12/24	Sat	14:00 - 17:00	

## REVISION COURSE

27 hours

9 sessions

TRAINER >	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up						
	KYLE WONG CANTONESE			JONATHAN LAU ENGLISH			
	DATE	DAY	TIME	DATE	DAY	TIME	
1 Quantitative Methods**	05/01/25	Sun	10:00 - 13:00	04/01/25	Sat	10:00 - 13:00	
2 Financial Statement Analysis**	05/01/25	Sun	14:00 - 17:00	11/01/25	Sat	10:00 - 13:00	
3 Financial Statement Analysis	12/01/25	Sun	10:00 - 13:00	11/01/25	Sat	14:00 - 17:00	
4 Portfolio Management + Corporate Issuers	12/01/25	Sun	14:00 - 17:00	18/01/25	Sat	10:00 - 13:00	
5 Corporate Issuers + Alternative Investments	19/01/25	Sun	10:00 - 13:00	18/01/25	Sat	14:00 - 17:00	
6 Equity	19/01/25	Sun	14:00 - 17:00	25/01/25	Sat	10:00 - 13:00	
7 Fixed Income	23/01/25	Thu	19:00 - 22:00	25/01/25	Sat	14:00 - 17:00	
8 Derivative Investments + Economics**	02/02/25	Sun	10:00 - 13:00	01/02/25	Sat	10:00 - 13:00	
9 Economics + Ethical and Professional Standards	02/02/25	Sun	14:00 - 17:00	01/02/25	Sat	14:00 - 17:00	

## ONLINE MOCK

4.5 hours

DATE	DAY	TIME
08/02/2025	Sat	10:00 - 12:15 & 12:45 - 15:00

\*\*Pre-requisite reading video on [Quantitative Methods](#), [Financial Statement Analysis](#) and [Economics](#) is available for student, you are strongly advised to review through our Kaplan eLearning platform before class to strengthen your foundation.

## MOCK EXAM REVIEW

3 hours

CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up						
KYLE WONG CANTONESE			JONATHAN LAU ENGLISH			
DATE	DAY	TIME	DATE	DAY	TIME	
13/02/25	Thu	19:00 - 22:00	12/02/25	Wed	19:00 - 22:00	

# CFA LEVEL I - COURSE SCHEDULE

LEVEL

MAY

## EDUCATION PROGRAM

60 hours

20 sessions

TRAINER >	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up			ONLINE	
	J. LAM CANTONESE	J. Lam will deliver the session via Live-streaming from other region.		KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
	DATE	DAY	TIME	DATE	DATE
1 Quantitative Methods**	09/01/25	Thu	19:00 - 22:00	Videos will be released by phases from late Oct to late Dec	Videos will be released by phases from late Oct to late Dec
2 Quantitative Methods	14/01/25	Tue	19:00 - 22:00		
3 Quantitative Methods + <b>Online Progress Test Release</b>	16/01/25	Thu	19:00 - 22:00		
4 Financial Statement Analysis**	21/01/25	Tue	19:00 - 22:00		
5 Financial Statement Analysis	23/01/25	Thu	19:00 - 22:00		
6 Financial Statement Analysis	04/02/25	Tue	19:00 - 22:00		
7 Financial Statement Analysis + <b>Online Progress Test Release</b>	11/02/25	Tue	19:00 - 22:00		
8 Portfolio Management	13/02/25	Thu	19:00 - 22:00		
9 Portfolio Management + Corporate Issuers	18/02/25	Tue	19:00 - 22:00		
10 Corporate Issuers	20/02/25	Thu	19:00 - 22:00		
11 Equity	25/02/25	Tue	19:00 - 22:00		
12 Equity + <b>Online Progress Test Release</b>	27/02/25	Thu	19:00 - 22:00		
13 Fixed Income	04/03/25	Tue	19:00 - 22:00		
14 Fixed Income	06/03/25	Thu	19:00 - 22:00		
15 Fixed Income	11/03/25	Tue	19:00 - 22:00		
16 Derivatives	13/03/25	Thu	19:00 - 22:00		
17 Derivatives + Alternative Investments + <b>Online Progress Test Release</b>	18/03/25	Tue	19:00 - 22:00		
18 Economics**	20/03/25	Thu	19:00 - 22:00		
19 Economics + <b>Online Progress Test Release</b>	25/03/25	Tue	19:00 - 22:00		
20 Ethical and Professional Standards + <b>Online Progress Test Release</b>	27/03/25	Thu	19:00 - 22:00		

## REVISION COURSE

27 hours

9 sessions

TRAINER >	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up			ONLINE	
	J. LAM CANTONESE	J. Lam will deliver the session via Live-streaming from other region.		KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
	DATE	DAY	TIME	DATE	DATE
1 Quantitative Methods**	01/04/25	Tue	19:00 - 22:00	Video will be released by phases from mid Jan to Early Feb	Video will be released by phases from mid Jan to Early Feb
2 Financial Statement Analysis**	03/04/25	Thu	19:00 - 22:00		
3 Financial Statement Analysis	08/04/25	Tue	19:00 - 22:00		
4 Portfolio Management + Corporate Issuers	10/04/25	Thu	19:00 - 22:00		
5 Corporate Issuers + Alternative Investments	15/04/25	Tue	19:00 - 22:00		
6 Equity	17/04/25	Thu	19:00 - 22:00		
7 Fixed Income	22/04/25	Tue	19:00 - 22:00		
8 Derivative Investments + Economics**	24/04/25	Thu	19:00 - 22:00		
9 Economics + Ethical and Professional Standards	29/04/25	Tue	19:00 - 22:00		

## ONLINE MOCK

4.5 hours

DATE	DAY	TIME
3/5/2025	Sat	10:00 - 12:15 & 12:45 - 15:00

\*\*Pre-requisite reading video on [Quantitative Methods](#), [Financial Statement Analysis](#) and [Economics](#) is available for student, you are strongly advised to review through our Kaplan eLearning platform before class to strengthen your foundation.

## MOCK EXAM REVIEW

3 hours

CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up			ONLINE	
J. LAM CANTONESE	J. Lam will deliver the session via Live-streaming from other region.		KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
DATE	DAY	TIME	DATE	DATE
08/05/25	Thu	19:00 - 22:00	04/05/25	04/05/25

## CFA LEVEL I - COURSE SCHEDULE

## EDUCATION PROGRAM

60 hours

20 sessions

TRAINER > LANGUAGE >		ONLINE		
		J. LAM CANTONESE	KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
		VIDEO RELEASE DATE		
1	Quantitative Methods**	Video will be released by phases from mid Jan to late Mar	All videos are available for review	All videos are available for review
2	Quantitative Methods			
3	Quantitative Methods + <b>Online Progress Test Release</b>			
4	Financial Statement Analysis**			
5	Financial Statement Analysis			
6	Financial Statement Analysis			
7	Financial Statement Analysis + <b>Online Progress Test Release</b>			
8	Portfolio Management			
9	Portfolio Management + Corporate Issuers			
10	Corporate Issuers			
11	Equity			
12	Equity + <b>Online Progress Test Release</b>			
13	Fixed Income			
14	Fixed Income			
15	Fixed Income			
16	Derivatives			
17	Derivatives + Alternative Investments + <b>Online Progress Test Release</b>			
18	Economics**			
19	Economics + <b>Online Progress Test Release</b>	Study Tips:  Please ensure to review all session <u>videos</u> and complete the <u>progress tests</u> . This preparation will solidify your knowledge of the exam concepts, ideally <u>four to six months prior</u> .		
20	Ethical and Professional Standards + <b>Online Progress Test Release</b>			

## REVISION COURSE

27 hours

9 sessions

TRAINER > LANGUAGE >		ONLINE		
		J. LAM CANTONESE	KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
		VIDEO RELEASE DATE		
1	Quantitative Methods**	Video will be released by phases from Early Apr to Early May	Video will be released by phases from mid Jan to Early Feb	Video will be released by phases from mid Jan to Early Feb
2	Financial Statement Analysis**			
3	Financial Statement Analysis			
4	Portfolio Management + Corporate Issuers			
5	Corporate Issuers + Alternative Investments			
6	Equity			
7	Fixed Income			
8	Derivative Investments + Economics**			
9	Economics + Ethical and Professional Standards			
		Study Tips:  Please ensure to review all session <a href="#">videos</a> and practice the Q&A. This preparation will help you achieve optimal results ahead of the exam, ideally <a href="#">one to two months prior</a> .		

## ONLINE MOCK

4.5 hours

EXAM	DATE	DAY	TIME
AUG	02/08/25	Sat	10:00 - 12:15 & 12:45 - 15:00
NOV	01/11/25	Sat	10:00 - 12:15 & 12:45 - 15:00

\*\*Pre-requisite reading video on Quantitative Methods, Financial Statement Analysis and Economics is available for student, you are strongly advised to review through our Kaplan eLearning platform before class to strengthen your foundation.

## MOCK EXAM REVIEW

3 hours

ONLINE		
J. LAM CANTONESE	KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
VIDEO RELEASE DATE		
<b>AUG</b> : Video will be available from 03/08/25 <b>NOV</b> : Video will be available from 02/11/25		

# CFA LEVEL I - COURSE FEE (2025)

## Enroll Early to Save 17% on Full Package

\*Full package includes all three phases learning:



Our package guides you through the entire learning process from knowledge building (education) to knowledge reinforcement (revision) to mock exam which equips you for exam-day success.

EARLY BIRD PRICE

ORIGINAL PRICE

HK\$9,950<sup>^</sup>

HK\$12,000

### Add-on (Optional)

Get a set of 2025 Schweser Essential Package (Online) at HK\$3,900 (Retail Price HK\$5,700) to further increase your content retention. Extra HK\$1,200 for the printed material of SchweserNotes & QuickSheet Kit. Available for student who enrolled Full Package only.



## Enroll Early to Save 16% on Revision Course



Revision course would be recommended, if you already has a strong understanding of the curriculum but needs to learn and/or refresh themselves with the curriculum.

EARLY BIRD PRICE

ORIGINAL PRICE

HK\$5,460<sup>^</sup>

HK\$6,500

\*Course fees apply to both classroom learning and online learning.

<sup>^</sup>Refer to the Enrollment Form for the Early Bird Deadline for each exam window.

### Interest-free Installments

Card holders of HSBC/SC VISA/Master card, and selected Amex Cards can enjoy:

3/6-month(HSBC/SC) or 12-month(Amex) interest-free installment for fees of \$6,000 or above in single payment.

Credit cards bearing the American Express name, brand or logo issued by its licensees in Hong Kong are eligible for the Interest Free Installment Plan. Credit Cards, Corporate Cards, and US Dollars Cards issued in Hong Kong by American Express International, Inc. and all American Express Cards issued outside of Hong Kong are not eligible for this Interestfree Installment Plan. Please check with Kaplan for details.

### Free Seminars & Demo Lecture

Understand more about the curriculum and exam tips. Trainer is here to answer your questions.

RSVP Now:

<https://www.kaplan.com.hk/event-list>



### Upon successful enrollment (Full Package)

Start your preparation before class commencement

#### Online pre-course

Enroll Full Package by early bird deadline for our exclusive online pre-course features:

Level I:

Approximate 9 hours of online instruction on Fundamental Financial Reporting, Financial Maths, Basic Economics and BAII+ Calculator tips



## ONLINE STORE SPECIAL

### EXTRA \$300 OFF

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MAY

CFA2025MAY

AUG

CFA2025AUG

NOV

CFA2025NOV

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# CFA LEVEL II - COURSE SCHEDULE

LEVEL  
**MAY**

## EDUCATION PROGRAM

54 hours

18 sessions

TRAINER >		CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up				
		KYLE WONG				
		CANTONESE				
		DATE	DAY	TIME		
1	Ethical and Professional Standards + Financial Statement Analysis	08/02/25	Sat	10:00	-	13:00
2	Financial Statement Analysis	08/02/25	Sat	14:00	-	17:00
3	Financial Statement Analysis + Online Progress Test Release	15/02/25	Sat	10:00	-	13:00
4	Corporate Issuers	15/02/25	Sat	14:00	-	17:00
5	Corporate Issuers	22/02/25	Sat	10:00	-	13:00
6	Quantitative Methods	22/02/25	Sat	14:00	-	17:00
7	Quantitative Methods	01/03/25	Sat	10:00	-	13:00
8	Economics	01/03/25	Sat	14:00	-	17:00
9	Economics + Portfolio Management + Online Progress Test Release	08/03/25	Sat	10:00	-	13:00
10	Portfolio Management	08/03/25	Sat	14:00	-	17:00
11	Equity	15/03/25	Sat	10:00	-	13:00
12	Equity	15/03/25	Sat	14:00	-	17:00
13	Equity + Alternative Investments	22/03/25	Sat	10:00	-	13:00
14	Alternative Investments + Online Progress Test Release	22/03/25	Sat	14:00	-	17:00
15	Fixed Income	29/03/25	Sat	10:00	-	13:00
16	Fixed Income	29/03/25	Sat	14:00	-	17:00
17	Derivatives	05/04/25	Sat	10:00	-	13:00
18	Derivatives + Online Progress Test Release	05/04/25	Sat	14:00	-	17:00

## REVISION COURSE

27 hours

9 sessions

TRAINER >		CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up				
		KYLE WONG				
		CANTONESE				
		DATE	DAY	TIME		
1	Financial Statement Analysis	12/04/25	Sat	10:00	-	13:00
2	Financial Statement Analysis	12/04/25	Sat	14:00	-	17:00
3	Corporate Issuers	26/04/25	Sat	10:00	-	13:00
4	Quantitative Methods	26/04/25	Sat	14:00	-	17:00
5	Equity	03/05/25	Sat	10:00	-	13:00
6	Alternative Investments	03/05/25	Sat	14:00	-	17:00
7	Fixed Income	10/05/25	Sat	10:00	-	13:00
8	Derivatives	10/05/25	Sat	14:00	-	17:00
9	Portfolio Management + Economics + Ethics	14/05/25	Wed	19:00	-	22:00

## ONLINE MOCK

4 hours 24 mins

DATE	DAY	TIME
17/5/2025	Sat	10:00 - 12:12 & 12:42 - 14:54

## MOCK EXAM REVIEW

3 hours

CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up		
KYLE WONG		
CANTONESE		
DATE	DAY	TIME
20/05/25	Tue	19:00 - 22:00

# CFA LEVEL II - COURSE SCHEDULE

AUG / NOV

LEVEL



## EDUCATION PROGRAM

(Cantonese)

54 hours

18 sessions

		ONLINE
TRAINER >		KYLE WONG
		VIDEO RELEASE DATE
1	Ethical and Professional Standards + Financial Statement Analysis	<p>Video will be released by phases from Early Feb to mid Apr</p> <p><b>Study Tips:</b></p> <p>Please ensure to review all session <u>videos</u> and complete the <u>progress tests</u>. This preparation will solidify your knowledge of the exam concepts, ideally <u>four to six months prior</u>.</p>
2	Financial Statement Analysis	
3	Financial Statement Analysis + Online Progress Test Release	
4	Corporate Issuers	
5	Corporate Issuers	
6	Quantitative Methods	
7	Quantitative Methods	
8	Economics	
9	Economics + Portfolio Management + Online Progress Test Release	
10	Portfolio Management	
11	Equity	
12	Equity	
13	Equity + Alternative Investments	
14	Alternative Investments + Online Progress Test Release	
15	Fixed Income	
16	Fixed Income	
17	Derivatives	
18	Derivatives + Online Progress Test Release	

## REVISION COURSE

(Cantonese)

27 hours

9 sessions

		ONLINE
TRAINER >		KYLE WONG
		VIDEO RELEASE DATE
1	Financial Statement Analysis	<p>Video will be released by phases from mid Apr to mid May</p> <p><b>Study Tips:</b></p> <p>Please ensure to review all session <u>videos</u> and practice the Q&amp;A. This preparation will help you achieve optimal results ahead of the exam, ideally <u>one to two months prior</u>.</p>
2	Financial Statement Analysis	
3	Corporate Issuers	
4	Quantitative Methods	
5	Equity	
6	Alternative Investments	
7	Fixed Income	
8	Derivatives	
9	Portfolio Management + Economics + Ethics	

## ONLINE MOCK

4 hours 24 mins

EXAM	DATE	DAY	TIME
AUG	09/08/25	Sat	10:00 - 12:12 & 12:42 - 14:54
NOV	08/11/25	Sat	10:00 - 12:12 & 12:42 - 14:54

## MOCK EXAM REVIEW (Cantonese)

3 hours

ONLINE
KYLE WONG
VIDEO RELEASE DATE
<p><b>AUG:</b> Video will be available from 10/08/25</p> <p><b>NOV:</b> Video will be available from 09/11/25</p>

# CFA LEVEL II - COURSE FEE (2025)

## Enroll Early to Save 14% on Full Package

\*Full package includes all three phases learning:



Our package guides you through the entire learning process from knowledge building (education) to knowledge reinforcement (revision) to mock exam which equips you for exam-day success.

EARLY BIRD PRICE

ORIGINAL PRICE

HK\$13,950<sup>^</sup>

HK\$16,400

### Add-on (Optional)

Get a set of 2025 Schweser Essential Package (Online) at HK\$4,500 (Retail Price HK\$6,100) to further increase your content retention. Extra HK\$1,200 for the printed material of SchweserNotes & QuickSheet Kit. Available for student who enrolled Full Package only.



## Enroll Early to Save 20% on Revision Course



Revision course would be recommended, if you already has a strong understanding of the curriculum but needs to learn and/or refresh themselves with the curriculum.

EARLY BIRD PRICE

ORIGINAL PRICE

HK\$7,600<sup>^</sup>

HK\$9,500

\*Course fees apply to both classroom learning and online learning.

<sup>^</sup>Refer to the Enrollment Form for the Early Bird Deadline for each exam window.

### Interest-free Installments

Card holders of HSBC/SC VISA/Master card, and selected Amex Cards can enjoy:

3/6-month(HSBC/SC) or 12-month(Amex) interest-free installment for fees of \$6,000 or above in single payment.

Credit cards bearing the American Express name, brand or logo issued by its licensees in Hong Kong are eligible for the Interest Free Installment Plan. Credit Cards, Corporate Cards, and US Dollars Cards issued in Hong Kong by American Express International, Inc. and all American Express Cards issued outside of Hong Kong are not eligible for this Interestfree Installment Plan. Please check with Kaplan for details.

### Free Seminars & Demo Lecture

Understand more about the curriculum and exam tips. Trainer is here to answer your questions.

RSVP Now:

<https://www.kaplan.com.hk/event-list>



### Upon successful enrollment (Full Package)

Start your preparation before class commencement

### Highly recommend (Optional):

Add-on Schweser Essential Package at discount price to get Supplementary online resource for your exam prep.



## ONLINE STORE SPECIAL

### EXTRA \$300 OFF

(Limited Offer) with promotional code:



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MAY

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# CFA LEVEL III - COURSE SCHEDULE

EDUCATION PROGRAM		(Cantonese)	Core Module:		30 hours	10 sessions		
			Specialized Pathway:		12 hours	4 sessions		
TRAINER >			CLASSROOM + ONLINE <small>Classroom + Live Streaming + Online Catch up</small>					
			KYLE WONG					
			PORTFOLIO MANAGEMENT		PRIVATE WEALTH			
			CORE MODULE					
		DATE	DAY	TIME		1-10 sessions (Core Module) are shared across all specialized pathways		
1	Capital Market Expectations	09/11/24	Sat	10:00 - 13:00				
2	Capital Market Expectations	09/11/24	Sat	14:00 - 17:00				
3	Asset Allocation + Online Progress Test Release	16/11/24	Sat	10:00 - 13:00				
4	Portfolio Construction	16/11/24	Sat	14:00 - 17:00				
5	Portfolio Construction	23/11/24	Sat	10:00 - 13:00				
6	Overview of Private Wealth Management	23/11/24	Sat	14:00 - 17:00				
7	Portfolio Performance Evaluation + Online Progress Test Release	07/12/24	Sat	10:00 - 13:00				
8	GIPS	07/12/24	Sat	14:00 - 17:00				
9	Derivatives	14/12/24	Sat	10:00 - 13:00				
10	Currency Management + Ethics + Online Progress Test Release	14/12/24	Sat	14:00 - 17:00				
TRAINER >			SPECIFIC PATHWAY					
			KYLE WONG			KYLE WONG		
		DATE	DAY	TIME		DATE	DAY	TIME
11	Specialized Pathway	28/12/24	Sat	10:00 - 13:00		22/12/24	Sun	10:00 - 13:00
12	Specialized Pathway	28/12/24	Sat	14:00 - 17:00		22/12/24	Sun	14:00 - 17:00
13	Specialized Pathway	04/01/25	Sat	10:00 - 13:00		29/12/24	Sun	10:00 - 13:00
14	Specialized Pathway + Online Progress Test Release	04/01/25	Sat	14:00 - 17:00		29/12/24	Sun	14:00 - 17:00

REVISION COURSE	(Cantonese)	Core Module:	21 hours	7 sessions			
		Specialized Pathway:	6 hours	2 sessions			
		TRAINER >	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up				
			KYLE WONG				
PORTFOLIO MANAGEMENT	PRIVATE WEALTH						
		CORE MODULE					
		DATE	DAY	TIME	1-7 sessions (Core Module) are shared across all specialized pathways		
1	Capital Market Expectation	08/01/25	Wed	19:00 - 22:00			
2	Asset Allocation	11/01/25	Sat	10:00 - 13:00			
3	Portfolio Construction	11/01/25	Sat	14:00 - 17:00			
4	Overview of Private Wealth Management	15/01/25	Wed	19:00 - 22:00			
5	Portfolio Performance Evaluation+GIPS	18/01/25	Sat	10:00 - 13:00			
6	Derivatives	18/01/25	Sat	14:00 - 17:00			
7	Currency Management + Ethics	22/01/25	Wed	19:00 - 22:00			
TRAINER >	SPECIFIC PATHWAY						
	KYLE WONG			KYLE WONG			
			DATE	DAY	TIME		
8	Specialized Pathway	25/01/25	Sat	10:00 - 13:00	26/01/25	Sun	10:00 - 13:00
9	Specialized Pathway	25/01/25	Sat	14:00 - 17:00	26/01/25	Sun	14:00 - 17:00

ONLINE MOCK		4 hours 24 mins
DATE	DAY	TIME
01/02/25	Sat	10:00 - 12:12 & 12:42 - 14:54

MOCK EXAM REVIEW		(Cantonese)		3 hours
CLASSROOM + ONLINE				
Classroom + Live Streaming + Online Catch up				
KYLE WONG				
PORTFOLIO MANAGEMENT			PRIVATE WEALTH	
CORE MODULE				
DATE	DAY	TIME		(Core Module) are shared across all specialized pathways
11/02/25	Tue	19:00 - 22:00		
SPECIFIC PATHWAY				
KYLE WONG			KYLE WONG	
Questions on Specialized pathway will be reviewed during the same timeslot			Questions on Specialized pathway will be reviewed during the same timeslot	



## CFA LEVEL III - COURSE SCHEDULE

EDUCATION PROGRAM (Cantonese)		Core Module:	30 hours	10 sessions
		Specialized Pathway:	12 hours	4 sessions
TRAINER >		ONLINE		
		KYLE WONG		
		PORTFOLIO MANAGEMENT	PRIVATE WEALTH	
		CORE MODULE		
		VIDEO RELEASE DATE		
1	Capital Market Expectations	1-10 sessions (Core Module) are shared across all specialized pathways  All videos are available for review		
2	Capital Market Expectations			
3	Asset Allocation + Online Progress Test Release			
4	Portfolio Construction			
5	Portfolio Construction			
6	Overview of Private Wealth Management			
7	Portfolio Performance Evaluation + Online Progress Test Release			
8	GIPS			
9	Derivatives			
10	Currency Management + Ethics + Online Progress Test Release			
		SPECIFIC PATHWAY		
11	Specialized Pathway	All videos are available for review		All videos are available for review
12	Specialized Pathway			
13	Specialized Pathway			
14	Specialized Pathway + Online Progress Test Release			

REVISION COURSE		(Cantonese)		Core Module:	21 hours	7 sessions
				Specialized Pathway:	6 hours	2 sessions
TRAINER >				ONLINE		
				KYLE WONG		
				PORTFOLIO MANAGEMENT		PRIVATE WEALTH
				CORE MODULE		
				VIDEO RELEASE DATE		
1	Capital Market Expectation			Video will be released by phases from mid Jan to Early Feb		
2	Asset Allocation					
3	Portfolio Construction					
4	Overview of Private Wealth Management					
5	Portfolio Performance Evaluation+GIPS					
6	Derivatives					
7	Currency Management + Ethics					
				SPECIFIC PATHWAY		
8	Specialized Pathway	Video will be released by phases from late Jan to Early Feb		Video will be released by phases from late Jan to Early Feb		
9	Specialized Pathway					

ONLINE MOCK		4 hours 24 mins
DATE	DAY	TIME
02/08/25	Sat	10:00 - 12:12 & 12:42 - 14:54

MOCK EXAM REVIEW (Cantonese)		3 hours
<b>ONLINE</b>		
<b>KYLE WONG</b>		
<b>PORTFOLIO MANAGEMENT</b>		<b>PRIVATE WEALTH</b>
<b>CORE MODULE</b>		
<b>VIDEO RELEASE DATE</b>		
Video will be available from 09/08/25		
<b>SPECIFIC PATHWAY</b>		
Questions on Specialized pathway will be reviewed during the same timeslot		Questions on Specialized pathway will be reviewed during the same timeslot

# CFA LEVEL III - COURSE FEE (2025)

## Enroll Early to Save 15% on Full Package

\*Full package includes all three phases learning:



Education



Revision



Mock & Review

Our package guides you through the entire learning process from knowledge building (education) to knowledge reinforcement (revision) to mock exam which equips you for exam-day success.

EARLY BIRD PRICE

HK\$14,600<sup>^</sup>

ORIGINAL PRICE

HK\$17,200

### Add-on (Optional)

Get a set of 2025 Schweser Essential Package (Online) at HK\$4,520 (Retail Price HK\$6,500) to further increase your content retention. Extra HK\$1,200 for the printed material of SchweserNotes & QuickSheet Kit. Available for student who enrolled Full Package only.



## Enroll Early to Save 20% on Revision Course



Revision

Revision course would be recommended, if you already has a strong understanding of the curriculum but needs to learn and/or refresh themselves with the curriculum.

EARLY BIRD PRICE

HK\$8,720<sup>^</sup>

ORIGINAL PRICE

HK\$10,900

\*Course fees apply to both classroom learning and online learning.

<sup>^</sup>Refer to the Enrollment Form for the Early Bird Deadline for each exam window.

### Interest-free Installments

Card holders of HSBC/SC VISA/Master card, and selected Amex Cards can enjoy:

3/6-month(HSBC/SC) or 12-month(Amex) interest-free installment for fees of \$6,000 or above in single payment.

Credit cards bearing the American Express name, brand or logo issued by its licensees in Hong Kong are eligible for the Interest Free Installment Plan. Credit Cards, Corporate Cards, and US Dollars Cards issued in Hong Kong by American Express International, Inc. and all American Express Cards issued outside of Hong Kong are not eligible for this Interestfree Installment Plan. Please check with Kaplan for details.

### Free Seminars & Demo Lecture

Understand more about the curriculum and exam tips. Trainer is here to answer your questions.

RSVP Now:

<https://www.kaplan.com.hk/event-list>



## Level III Specialized Pathways

For 2025 Level III exams, Candidates will be able to select a path that teaches content more directly related to their interests and aspirations. The three versions will have a 'common core' of curriculum at Level III, supplemented by specialized content for each pathway.

- Portfolio Management
- Private Markets
- Private Wealth

For Details :

<https://www.cfainstitute.org/en/programs/cfa/exam/level-iii-pathways>

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1

Personal Particulars ▶

\*Must complete

I am a

☐ New Student

☐ Old Student

☐ Free Rejoin Student

\* (Mr/Mrs/Miss) Surname:

\* Forename:

\* Mobile/ Contact No.:

CFA Candidate No.:

\* HKID/ Passport No.:

(First 4 digits. i.e. A123)

Nationality:

(This field must be completed if a passport no. is provided)

\* Email:

\* Year of Birth:

☐ I have reached the age of 18 or above

(YYYY)

Company:

Position:

Postal Address:

Delivery Address:

Applicable to Online Program only

Leave it blank if it is the same as your postal address. Please provide a weekday daytime delivery address and ensure that either yourself or an authorized person will receive the order.

2

Education ▶

Highest Education Achieved\*

☐ Bachelor's degree, Major in

☐ Master's degree in

☐ Doctoral degree in

☐ At least 4 years of full-time professional work experience

☐ Current student, exam window must be within 23 months of your graduation month of bachelor degree, major in

3 Class Selection ▶		Classroom + Online with Live streaming and Online Catch-up	Online	Early Bird Price	Full Price
May	Level I Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/> J. Lam (Cantonese) <i>J. Lam will deliver the session via Live-streaming from other region.</i>	<input type="checkbox"/> Kyle Wong (Cantonese) <input type="checkbox"/> Jonathan Lau (English)	On or before 3 Jan 25 <input type="checkbox"/> \$9,950	4 Jan 25 onwards <input type="checkbox"/> \$12,000
	Level I Revision Course	<input type="checkbox"/> J. Lam (Cantonese) <i>J. Lam will deliver the session via Live-streaming from other region.</i>	<input type="checkbox"/> Kyle Wong (Cantonese) <input type="checkbox"/> Jonathan Lau (English)	On or before 25 Mar 25 <input type="checkbox"/> \$5,460	26 Mar 25 onwards <input type="checkbox"/> \$6,500
	Level II Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/> Kyle Wong (Cantonese)		On or before 1 Feb 25 <input type="checkbox"/> \$13,950	2 Feb 25 onwards <input type="checkbox"/> \$16,400
	Level II Revision Course	<input type="checkbox"/> Kyle Wong (Cantonese)		On or before 5 Apr 25 <input type="checkbox"/> \$7,600	6 Apr 25 onwards <input type="checkbox"/> \$9,500
May	Add-on: Schweser Essential Package (Online) <sup>(1)</sup> (includes SchweserNotes™ with Quicksheets, Videos, Qbank, Mock exams & other resources)			<input type="checkbox"/> Level I \$3,900 (original \$5,700)	
				<input type="checkbox"/> Level II \$4,050 (original \$6,100)	
	Add-on: SchweserNotes™ with Quicksheet (Printed) <sup>(2)</sup>			<input type="checkbox"/> Level I \$1,200	
				<input type="checkbox"/> Level II \$1,200	

		Online		Early Bird Price	Full Price
Aug	Level I Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/>	J. Lam (Cantonese)	On or before 26 Apr 25	27 Apr 25 onwards
		<input type="checkbox"/>	Kyle Wong (Cantonese)	<input type="checkbox"/> \$9,950	<input type="checkbox"/> \$12,000
		<input type="checkbox"/>	Jonathan Lau (English)		
	Level I Revision Course	<input type="checkbox"/>	J. Lam (Cantonese)	On or before 28 Jun 25	29 Jun 25 onwards
		<input type="checkbox"/>	Kyle Wong (Cantonese)	<input type="checkbox"/> \$5,460	<input type="checkbox"/> \$6,500
		<input type="checkbox"/>	Jonathan Lau (English)		
	Level II Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/>	Kyle Wong (Cantonese)	On or before 26 Apr 25	27 Apr 25 onwards
	Level II Revision Course	<input type="checkbox"/>	Kyle Wong (Cantonese)	On or before 28 Jun 25	29 Jun 25 onwards
				<input type="checkbox"/> \$7,600	<input type="checkbox"/> \$9,500
On or before 26 Apr 25				27 Apr 25 onwards	
Level III Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/>	Kyle Wong (Cantonese)	<input type="checkbox"/> \$14,600	<input type="checkbox"/> \$17,200	
Level III Revision Course	<input type="checkbox"/>	Kyle Wong (Cantonese)	On or before 28 Jun 25	29 Jun 25 onwards	
			<input type="checkbox"/> \$8,720	<input type="checkbox"/> \$10,900	
Aug	Add-on: Schweser Essential Package (Online) <sup>(1)</sup> (includes SchweserNotes™ with Quicksheets, Videos, Qbank, Mock exams & other resources)			<input type="checkbox"/> Level I	\$3,900 (original \$5,700)
				<input type="checkbox"/> Level II	\$4,050 (original \$6,100)
				<input type="checkbox"/> Level III	\$4,250 (original \$6,500)
	Add-on: SchweserNotes™ with Quicksheet (Printed) <sup>(1)</sup>			<input type="checkbox"/> Level I	\$1,200
				<input type="checkbox"/> Level II	\$1,200
<input type="checkbox"/> Level III				\$1,200	



Class Selection ▶		Online		Early Bird Price	Full Price
Nov	Level I Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/>	J. Lam (Cantonese)	On or before 26 Jul 25	27 Jul 25 onwards
		<input type="checkbox"/>	Kyle Wong (Cantonese)	<input type="checkbox"/> \$9,950	<input type="checkbox"/> \$12,000
		<input type="checkbox"/>	Jonathan Lau (English)		
	Level I Revision Course	<input type="checkbox"/>	J. Lam (Cantonese)	On or before 27 Sep 25	28 Sep 25 onwards
		<input type="checkbox"/>	Kyle Wong (Cantonese)	<input type="checkbox"/> \$5,460	<input type="checkbox"/> \$6,500
		<input type="checkbox"/>	Jonathan Lau (English)		
	Level II Full Package (with Education, Revision Course and Mock Exam & Review)	<input type="checkbox"/>	Kyle Wong (Cantonese)	On or before 26 Jul 25	27 Jul 25 onwards
				<input type="checkbox"/> \$13,950	<input type="checkbox"/> \$16,400
Nov	Add-on: Schweser Essential Package (Online) <sup>(1)</sup> (includes SchweserNotes™ with Quicksheets, Videos, Qbank, Mock exams & other resources)	<input type="checkbox"/>		Level I	\$3,900 (original \$5,700)
		<input type="checkbox"/>		Level II	\$4,050 (original \$6,100)
	Add-on: SchweserNotes™ with Quicksheet (Printed) <sup>(1)</sup>	<input type="checkbox"/>		Level I	\$1,200
		<input type="checkbox"/>		Level II	\$1,200

Online Learning System Validation and its policy

Please view this demo link by scanning the QR code or browsing <https://bit.ly/3coyGGD> on your computer which you will access online lecture

Others	
Texas Instruments BA-II Plus™ Financial Calculator	<input type="checkbox"/> \$380
Shipping Request (applicable to online program only)	<input type="checkbox"/> \$500
Free Rejoin Pass Redemption*	<input type="checkbox"/> \$0

\*Terms and conditions apply

Total Payable

4 Method of Payment ▶

☐ Cheque No \_\_\_\_\_ ☐ Cash ☐ EPS ☐ FPS ☐ PayMe  
(payable to "Kaplan Financial (HK) Limited." Cheque should be received by Kaplan Financial 7 working days before course commencement.

☐ Credit Card Installment (Transaction over \$6,000 only. Must enroll in person. Do not send by fax/post)

☐ Credit Card (full payment) ☐ VISA ☐ AMEX ☐ MasterCard

For Email, Fax and Post Order Only

Card Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Expiry Date \_\_\_\_ / \_\_\_\_

Card Holder \_\_\_\_\_

Signature \_\_\_\_\_

Declarations

- I declare that all information provided in this form and all attached documents are, to the best of my knowledge, accurate and complete.
- I have understood and hereby agree to provide relevant proof of my academic qualifications and work experience upon request from Kaplan Financial at any time.
- I consent that I will abide by all the Rules, Regulations, and Code of Conduct of your company.
- I have read, understood and hereby agree to the terms and conditions stipulated on the brochure, enrollment form and on Kaplan Financial's website.
- I have met the system requirements of the eLearning platform and the testing result is satisfactory.
- I wish to receive Kaplan Information by email in the future.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Payment Methods

1) VISA / Master / Amex Card  
Payment can be made in person, by fax, email or by mail (see address at the bottom) or via online store.  
Interest-free installment: For transaction over \$6,000. Payment has to be made in person. Cardholders of HSBC/SC VISA / Mastercard and selected Amex Cards can enjoy a 3/6-month (HSBC/SC) or 12-month (Amex) interest-free installment for course fees of \$6,000 or above in single payment. The cardholder has to be the student himself/herself. Amex Cardholders, please call us first at +852 2526 3686 to check your credit card eligibility.

2) Cash / EPS  
Fees can be paid by cash or EPS at our E-Tech Centre Campus.

3) Cheque  
Fees can be paid by crossed cheque made payable to "Kaplan Financial (HK) Limited". Please mail the cheque and all required documents to us. Kaplan will not be responsible for any loss of payment sent by mail. If you are enrolling a course that will commence in less than 7 working days, you are advised against using cheque in view of delay arising from postage delay and bank clearance.

4) FPS / PayMe  
Fees can be paid by FPS or PayMe at our E-Tech Centre Campus or via our online store (<https://store.kaplan.com.hk/>).

Notes to Visa Holder Applicants

Holders of valid working visas or dependency visas are welcomed to consult Kaplan for admissions to live classes. If the existing visa does not indicate your eligibility for staying and / or studying in Hong Kong, please further consult the Immigration Department of the HKSAR Government. (website: <http://www.immd.gov.hk>; telephone: (852) 2824 6111). The Immigration Department is fully empowered for the processing of visa application and the approval for the applicants' eligibility for staying and /or studying in Hong Kong. Kaplan's acceptance of your application for the live class does not warrant for successful visa approval from the Immigration Office. Visa holder applicants and students should be careful of their full compliance with the relevant immigration laws and ordinances during their staying and studying in Hong Kong.

FOR OFFICIAL USE ONLY:

F-SO: \_\_\_\_\_ ST2000: \_\_\_\_\_ PY: \_\_\_\_\_ HK\$: \_\_\_\_\_ App#: \_\_\_\_\_ Date: \_\_\_\_\_ Handler: \_\_\_\_\_



## Terms and Conditions

Terms and Conditions are subject to change without notice. Please review the full and most updated version from our website [www.kaplan.com.hk/kfm](http://www.kaplan.com.hk/kfm) periodically. All matters and disputes will be subject to the final decision of Kaplan. These Terms and Conditions set out your entire agreement with Kaplan Financial for the particular course and supersede all previous agreements or understandings made (verbally or in writing) in relation to the course.

### Enrollment Policy

1. A completed enrollment form/order form must be accompanied by payment in full.
2. Prices are subject to change and we reserve the right to charge additional amounts to reflect any pricing changes taking effect before course commencement date(s).
3. Kaplan Financial reserves the right to cancel a course if enrollment is insufficient and/or make alterations regarding trainers, class locations, class schedules, topic sequence and time allocated to each topic should the circumstances so required.
4. Course administration details including confirmed dates and teaching venue will be emailed to students approximately 3 working days prior to course commencement.
5. Classroom courses will be delivered in person, unless there are health and safety measures or other unexpected situations that Kaplan is unable to ensure the safety of campus. If such situation occurs, the lessons may be delivered online without providing face-to-face sessions.

### Attendance Policy

6. An attendance sheet will be placed either outside or near the entrance of the classroom for sign-in. It is students' responsibility to sign for each session, as well as signing-in before students enter the classroom. It is students' responsibility to sign accurately and on time, as the signatures will be served as the only record of attendance.
7. Courses are not transferable between individuals. Under all circumstances, nobody except the registered students can participate in the registered class or gain access to student services. Kaplan Financial does not accept substitutes, in whole or in part, to obtain services, attend classes and sign on behalves. Regular attendance check, that involves a quick check of valid ID and contact information, will be conducted throughout the course without notice. Once entered into the premises, individuals will be bound by Kaplan Financial's school regulations.
8. Students are not allowed to swap or transfer class without Kaplan Financial's written or email approval.

### Cancellation Policy

9. 50% course fee is refundable at any time up to 2 weeks prior to the course commencement date. No refund is allowed thereafter.
10. Cost of any course notes, Kaplan Schweser products and financial calculator are not refundable.
11. Cancellations will be subject to an administrative fee of \$400 per course.
12. Funds received but not utilized or refunded in accordance with these Terms and Conditions will be forfeited to Kaplan Financial.
13. Refund will only be arranged upon the receipt of all necessary documents and course fee paid will be refunded to the participant by cheque.
14. Any request for refund due to extenuating personal reasons will be considered and determined on a case by case basis, upon presentation of supporting documentation. The common extenuating reasons are illness, accident, pregnancy and bereavement.
15. The following reasons will not be grounds for refund: students' financial circumstances, failure to register for an exam, taking the exam in a later exam sitting, not pursuing the designation, change of work circumstances (i.e. job, location, working hours, obligations etc), difficulty level of course not suitable, dislike of trainer's presentation style.

### Transfer Policy

16. Kaplan Financial would only accept written request to transfer to another class of the same course in the same exam sitting at any time up to 2 weeks prior to original course commencement. The request will be assessed and approved on a case-by-case basis, subject to classroom capacity and other conditions decided by Kaplan Financial. Any approved transfer will be subjected to an administrative fee of \$400 per course. This fee is non-refundable and non-transferable.
17. Students must complete the course in the current exam sitting and are not allowed to transfer or defer any portion of the course and fees to the future exam sittings.

### Attendance Certificate for CPT Purpose (available for Classroom Learning only)

18. For subjects relevant to the individual's function and which may help to enhance the performance of their job functions would meet CPT purpose. It is up to the employers or corporations to determine suitability of the course in meeting CPT requirement. Individuals are responsible for verifying with employers using course topics and schedule. It is a matter of discretion for individual employers to recognize any qualification to which this course may lead.
19. Within two months from the completion of the course, students may submit a request for certificate of attendance if they have achieved at least 70% attendance. \$150 will be charged for successful issuance. Students will be notified to collect the certificate at our centre in 14 working days.

### Live-Streaming and Online Video (available for Classroom Learning)

20. Kaplan Financial does not warrant that the live-streaming and online catch-up videos will be uninterrupted or error-free. All live-streaming and online catch-up videos are provided on an "as is, as available" basis. A substitute video of another trainer, lectured in a different language and pace might be arranged.
21. Attendance will not be counted for watching of a video for CPT or attendance purpose.
22. You agree to meet the minimum system requirements set forth for Kaplan Financial's online requirement. It is a limited license to use the content until the exam date of your enrolled semester. All online resources are to be used for the student's own personal use and benefit. Unauthorized use of the online resources may be subject to legal action.

### Swap Class (available for Classroom Learning)

23. Maximum of 6 sessions for Level I; 5 sessions for Level II & III for Classroom Learning Education Program students (2 sessions for Classroom Learning Revision Course students). You must accept and be aware that certain degree of variance do exist between classes of the same course. Swap class is only accepted for classes within the same course semester.
24. Request must be made at least 3 working days prior to the swapped class. Swap class will be accepted on a first-come, first-served basis.
25. You are required to sign on the attendance record sheet as usual when you enter a swap class. Your name will be written manually on the last page (swap class) of attendance list. Failure to sign-in on the right page would be regarded as absence.

### Online Access

26. Online Pre-course, videos and online progress tests are to be used for students' personal use and benefit. Shared use of online service is prohibited. Never share your password with anyone. Access will expire on the end of the month after the exam of your enrolled semester.
27. After the enrollment is completed, we will acknowledge your enrollment within 7 working days by (1) providing you the official receipt, (2) emailing you the login information. If you do not hear from us, please check with us at +852 2526 3686 or email to [hkcf@kaplan.com](mailto:hkcf@kaplan.com).

### Class Materials and Stationery

28. Print materials will be provided for Classroom Learning and will be distributed at regular intervals—first on the first day of the course and then throughout the course progression. Digital materials are also available and can be printed as needed for your convenience. For Online Learning, only digital materials will be provided.
29. All class materials must be collected within the same course semester.
30. Students must bring stationery and the financial calculator (Texas Instruments BAII Plus or HP 12C) to class. If students have not used HP 12C before, Kaplan Financial recommends Texas Instruments BAII Plus. Students must bring all course notes collected to class. Kaplan Financial does not have spare copies to lend.

### Housekeeping

31. All housekeeping issues of which students need to be aware, will be brought to students' attention on the first day of course.

### Copyright Policy

32. All class materials are for the sole use by registered students only. All materials, in whole or in part, may not be reproduced, shared, rent, copied or transmitted in any format or by any means, electronic or mechanical, including photocopying, recording, or by any information storage and retrieval system, without written permission from Kaplan Financial. The unauthorized duplication of class materials is a violation of global copyright laws.
33. Video or audio recording devices are prohibited under any circumstances.

### Online Learning

34. Enrollment to Online programmes will only be processed after Kaplan receives the applicants' signed acknowledgement of having satisfied Kaplan eLearners' system requirements. The validation aims to give you the opportunity to fully test the technology and ensure satisfactory viewing result before enrollment is processed. Your enrollment and payment will be put on hold until the validation is returned.
35. Digital course materials will be released in milestones. They can be printed as needed for your convenience.
36. This is a previous recording of a live stream class from a previous exam window in the same curricular year. Subsequent update/errata will be posted to the eLearning platform, if any.
37. It is a limited license to use the content only between the times of access is granted and the end of the month after the exam of your enrolled semester. Kaplan bears no responsibility to extend the access period, regardless of students' actual exam date.
38. For cancellations received in writing 2 weeks prior to activation of online account, 50% of the course fee will be charged. No refund is allowed thereafter.

### Kaplan Schweser Purchase

39. Sales of all products are final, non-refundable and non-returnable once order is placed and payment received.
40. Schweser study materials are protected by the laws of copyright of the United States and other countries throughout the world. Unauthorized creation, purchase, photocopy (i.e. pirated, illicit copies), scanning, use and transmitting of these materials, or portions thereof, in any form whatsoever, is a violation of the copyright law. Violators will be reported to the police and HK Customs and Excise Department where they may subject to criminal and civil liability.
41. The Schweser materials purchased are to be used for the purchaser's own personal use and benefit. Unauthorized commercial resale of Schweser materials is prohibited. Shared use of paper materials, and Online Access is prohibited. All products are non-transferable. Users must not share the username and password with anyone. Schweser reserves all its rights in the event of a violation of this policy, which may include suspension of purchaser's privileges and enforcement of Schweser's right under law and equity. After the order is successfully processed, you will receive login information assigned by Kaplan Schweser within seven working days. It is a limited license to use the content only between the times of access is granted and the end of the month after the exam of your enrolled semester. Kaplan bears no responsibility to extend the access period, regardless of purchasers actual exam date.
42. Schweser does not warrant that Online Access will be uninterrupted or error-free. Online access to [www.schweser.com](http://www.schweser.com) is provided on an "as is, as available" basis. You agree to meet the minimum system requirements set forth for Kaplan Schweser's electronic products.
43. Date of collection is subject to availability of different materials. Purchasers must present official receipt to collect the materials before the exam date of your enrolled semester. You are required to collect the material in person or you are welcome to arrange your own courier services. Kaplan offers delivery service at additional cost to a Hong Kong local address (preferably business address). The shipping time is around 2-4 working days. Working days are Monday through Friday. You are responsible for assuring there is an authorized personnel to receive the materials at time of delivery. Kaplan will not re-ship materials that are returned to us. The shipping time is around 2-4 business days. Business days are Monday through Friday.
44. Kaplan will deliver to most countries, subject to additional shipping charges. You are responsible for any tax and custom duties that may apply. Please contact us for a quotation.
45. Repeating discounts cannot be combined with any other offers, discounts or promotions. Candidates must present the required supporting documents at the time order is placed.

### Feedback Mechanism

47. Kaplan Financial encourages constructive feedback on all aspects about the quality of teaching and learning. Throughout the course, if students are not satisfied about our course or services, students are advised to write to the Course Director with full descriptions and evidence. Kaplan Financial will take reasonable and prompt action to try to resolve your concerns. Complaints that are lacking in substance and not made in good faith will not be taken.
48. A course evaluation will be administered at the end of the course.

### Ethics and Standards of Professional Conduct

49. Kaplan Financial and Schweser reserve the right to report any cases of misconduct, dishonesty, fraud or deceit to CFA Institute, other professional and government bodies. This can result in disciplinary action that may include in a delay in or a permanent suspension of student's participation in Kaplan Financial; also may impact on your membership and certification with CFA Institute.
50. If students see any suspicious act of unauthorized recording or illegal attendance during the class, please alert our staff. Kaplan Financial reserves our right to report any case found to the Police and relevant professional bodies, including but not limited to CFA Institute.

### Education Bureau Required Disclaimer

51. It is a matter of discretion for individual employers to recognize any qualification to which this course may lead.

### Personal Data Protection

52. If you do not wish to receive our offers and updates, please email us at [hkmarketing.kf@kaplan.com](mailto:hkmarketing.kf@kaplan.com) to unsubscribe.

### Code of Conduct

53. It is the responsibility of every student to be aware of the Kaplan Hong Kong Code of Conduct's content as published in <http://www.kaplan.com.hk/code-of-conduct> and to abide by its provisions.

### Free 6-month Rejoin Pass

54. The Rejoin Pass allows students to re-enroll in the CFA Full Package without any additional charges for the specified duration.
55. The Pass is available only to Students who have previously enrolled in the CFA Full Package provided by Kaplan Financial (HK) Ltd.
56. The Free 6-month Rejoin Pass is valid for a period of six (6) consecutive months from the end of the online platform subscription date of the enrolled semester which is the end of the month after the exam of your enrolled semester.
57. To redeem the Rejoin Pass, students must provide the following documents for same level, including, i) Exam fail notice/ Proof of approval of Deferral from CFAI, ii) The new exam registration notice for the same level, iii) The official receipt of the course originally enrolled in and iv) the Kaplan CFA Enrollment form of the rejoined course.
58. Students must contact Kaplan within thirty (30) days of receiving their exam results/deferral approval to initiate the redemption process.
59. Kaplan reserves the right to verify the provided proof of Exam fail notice/ Proof of approval of Deferral from CFAI and enrollment in the CFA Full Package.
60. The availability of the CFA Full Package for rejoining is subject to Kaplan's course schedule and capacity. Kaplan will make reasonable efforts to accommodate students who wish to rejoin the course, subject to availability. We may offer courses taught by a different trainer/language for your second attempt semester in the event that Kaplan does not provide similar offerings with the same trainer and language chosen by the student in the first enrolment.
61. The Rejoin Pass is non-transferable and cannot be sold, exchanged, or redeemed for cash.
62. Kaplan reserves the right to terminate the Pass or modify these Terms and Conditions at any time without prior notice. Any such modifications, suspensions, or terminations will be effective immediately upon posting the updated Terms on our website or by other means of communication.
63. Kaplan does not guarantee that rejoining the exam preparation course will result in improved exam performance or passing the public exam.

## Kaplan Financial (HK) Limited

Tel: (852) 2526 3686 | Fax: (852) 2501 0589

Email: [hkcf@kaplan.com](mailto:hkcf@kaplan.com)

[www.kaplan.com.hk/financial-markets](http://www.kaplan.com.hk/financial-markets)

## E-Tech Centre Campus

G/F to 3/F, E-Tech Centre, Nos 402-406  
Hennessy Road, Wanchai, Hong Kong  
(Causeway Bay MTR Exit A)

# KAPLAN CFA SCHWESER STUDY PACKAGE

Schweser study solutions are LO-based, concise, and efficient - keeping you engaged in the learning process. Schweser provides study plan comprised of video instruction, practice with thousands of questions, and retention tools to maintain top-of-mind awareness of key concepts.

## Exclusive Sale in Kaplan HK

Student who sign up Kaplan Full Package can add-on Schweser Essential Package (Online) at discount price of HK\$3,900 - HK\$4,250 within the same exam semester.



	Ultimate Package	Premium Package	Essential Package <sup>^</sup>
LEVEL I	HK\$11,200	HK\$8,000	HK\$5,700
LEVEL II	HK\$11,500	HK\$8,400	HK\$6,100
LEVEL III	HK\$11,800	HK\$8,800	HK\$6,500

CORE (STUDY TOOLS)				
SchweserNotes™ with Quicksheet* - include Module Quizzes & topic Quizzes	Print, eBook & Online	✓	✓	Online & eBook only
Quicksheet*	Print, eBook	✓	✓	eBook only
Module Videos	Online	✓	✓	✓
SchweserPro™ Qbank	Online	✓	✓	✓
Checkpoint Exams	Online	✓	✓	✓
Mock Exam (1-6)	Online	✓	✓	Mock exam 1-4 only
Resource Library	Online	✓	✓	✓
InstructorLink	Online	✓	-	-
INSTRUCTION				
OnDemand Class	Online	✓	✓	✓
Masterclass Workbooks	Print & Online	✓	Online only	Online only
CFA Institute Question Review Videos	Online	✓	✓	✓
FINAL REVIEW				
OnDemand Review Workshop	Online	✓	✓	-
Review Workshop Workbooks	Print & Online	✓	Online only	-
Secret Sauce®*	Print, eBook & Online	✓	✓	-
OTHER RESOURCES				
Flashcards	Print & Online	✓	-	-
PassProtection™	Online	✓	✓	✓

\*eBook version is only available to review through VitalSource® for the SchweserNotes™, Secret Sauce®, and QuickSheet with limited access period. For more information regarding VitalSource®, please visit our FAQ page ([https://www.schweser.com/faq?344-1\\_active=4](https://www.schweser.com/faq?344-1_active=4))

<sup>^</sup>Extra HK\$1,200 for the printed materials of SchweserNotes & QuickSheet Kit if you purchased Essential Package.

Schweser online access will now expire at the end of the month following your enrolled semester. Each Schweser study package comes with Kaplan Schweser Community online materials.

For Schweser Product Availability,  
please scan QR code  
<http://bit.ly/3twppsp>



## The Schweser PassProtection™

**Free  
OF CHARGE**  
for a second chance

Receive the online study materials **FREE OF CHARGE** for your next exam sitting\*. You are eligible if you meet the following criteria:



Have previously purchased an Essential, Premium, or Ultimate Package.











Are registered to retake your CFA exam.

**In order to enjoy the Schweser PassProtection™, you must attach the following documents for same level:**

1. Exam fail notice for same level / Proof of approval of Deferral from CFIA
2. New exam registration notice for same level
3. Schweser PassProtection™ Application Form

\*Gain access of online study materials for another sitting within the same year or receive new package if you are retaking the exam in the next curriculum year.

## KAPLAN SCHWESER PRODUCT DETAILS

<b>SchweserNotes™</b>	More than just textbooks. It breaks down the CFA Program curriculum into bite-sized segments that help you master each exam topic.  For Level I and III, there are a total of 4 books, while for Level II, there are 5 books in total.	
<b>QuickSheet</b>	This compact study tool summarizes key formulas, definitions, and concepts.	
<b>SchweserPro™ Qbank</b>	Prepare with thousands of foundational and exam-like questions, custom quizzes, tutorial videos, detailed explanations, and performance metrics.	
<b>Mock Exams (1-6)</b>	Don't go into exam day without practicing first. Replicate the actual CFA® exam with an experience that is as close to the real thing as you can get.	
<b>OnDemand Masterclass</b>	Masterclass ensures you have a strong grasp on the topic. Led by Schweser's expert instructors, you get 40+ hours of online instruction that reinforces your studies and ensures you're ready to move on to the next topic.	
<b>OnDemand Review Workshop</b>	Review exam topics that are causing you trouble, and build exam-day confidence by interacting with a CFA® Program expert in OnDemand sessions.	
<b>Secret Sauce®</b>	Knowing the curriculum is only half of the equation to success. Learn exam-day strategies, and receive guidance on how to pass the CFA exam. Flashcards	
<b>Flashcards</b>	Test your knowledge of every Learning Outcome Statement whenever you have 15 minutes to spare with this portable study tool.	

## OTHER ONLINE FEATURES

### CFA Institute Question Review Videos

This series of in-depth videos walks you through the end-of-reading questions from the CFA Institute Program curriculum.

### Instructor Link

Ask questions, and receive answers from an instructor at any time.

### Resource Library

This collection of online reference videos and resources will support you before and during studies.

### Module Videos

Reference these 50+ hours of recorded videos as you are reading through your SchweserNotes™ books to reinforce your understanding of the material.

### Checkpoint Exams

Three Checkpoint Exams with questions that mimic the difficulty and format of the actual CFA exam.

### JumpStart

Shortly after you complete your CFA® exam, the JumpStart materials will be automatically added to your Schweser portal as part of your Study Package. As you are waiting for your exam results, you can leverage these tools to get a jump on preparing for your next CFA exam.

### Kaplan Schweser Community

Access Schweser community forum to engage with our experts and other CFA candidates to post questions, find answers, and engage in meaningful discussions throughout your studies.

1

## Personal Particulars

\*Must complete | # Classroom or Online students must complete

I am a ☐ New Student ☐ Old Student

\*(Mr/Mrs/Miss) Surname: \_\_\_\_\_

\*Forename: \_\_\_\_\_

\*Mobile/ Contact No.: \_\_\_\_\_

CFA Candidate No.: \_\_\_\_\_

\*HKID/ Passport No.: \_\_\_\_\_  
(First 4 digits. i.e. A123)Nationality: \_\_\_\_\_  
(This field must be completed if a passport no. is provided)

\*Email: \_\_\_\_\_

\*Year of Birth: \_\_\_\_\_ (YYYY)  
☐ I have reached the age of 18 or above

Company: \_\_\_\_\_

Position: \_\_\_\_\_

Postal Address: \_\_\_\_\_

2

## Exam Semester\*

☐ Feb ☐ May ☐ Aug ☐ Nov

+Exam Levels &amp; windows: Level I (Feb, May, Aug, Nov); Level II (May, Aug, Nov); Level III (Feb, Aug)

3

## Choose Level III Pathway:

☐

Portfolio Management

☐

Private Wealth

☐

Private Markets

## Schweser Packages

## Ultimate Package

SchweserNotes™ (Print)*	+	OnDemand Review Workshop
Essential Package + QuickSheet (Print)		Review Workshop Workbooks (Print & Online)
Mock Exams (5-6)		Secret Sauce (Print, eBook & Online)
Masterclass Workbooks (Print)		Flashcards (Print & Online)

☐ \$11,200☐ \$11,500☐ \$11,800

## Premium (OnDemand) Package

SchweserNotes™ (Print)*	+	OnDemand Review Workshop
Essential Package + QuickSheet (Print)		Review Workshop Workbooks (Online)
Mock Exams (5-6)		Secret Sauce (Print, eBook & Online)

☐ \$8,000☐ \$8,400☐ \$8,800

## Essential Package

SchweserNotes™ (eBook & Online)*	+	Resource Library
QuickSheet (eBook)		InstructorLink
Module Videos		OnDemand Masterclass
SchweserPro™ Qbank		Masterclass Workbooks (Online)
Checkpoint Exams		CFA Institute Question Review Videos
Mock Exams (1-4)		PassProtection™

☐ \$5,700☐ \$6,100☐ \$6,500

## Add-on: SchweserNotes™ with Quicksheet (Printed)

Only Applicable on Essential Package

☐ \$1,200☐ \$1,200☐ \$1,200

## Others

Texas Instruments BA-II Plus™ Financial Calculator

☐ \$380

\* For Level I and III, there are a total of 4 books, while for Level II, there are 5 books in total.

Total Payable

4

## Method of Payment

☐ Cheque No. \_\_\_\_\_ ☐ Cash ☐ EPS ☐ FPS ☐ PayMe  
(payable to "Kaplan Financial (HK) Limited." Cheque should be received by Kaplan Financial 7 working days before course commencement.☐ Credit Card Installment (Transaction over \$6,000 only. Must enroll in person. Do not send by fax/post)☐ Credit Card (full payment) ☐ VISA ☐ AMEX ☐ MasterCard

For Email, Fax and Post Order Only

Card Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Expiry Date \_\_\_\_ / \_\_\_\_

Card Holder \_\_\_\_\_ Signature \_\_\_\_\_

## Declarations

- I declare that all information provided in this form and all attached documents are, to the best of my knowledge, accurate and complete.
- I have understood and hereby agree to provide relevant proof of my academic qualifications and work experience upon request from Kaplan Financial at any time.
- I consent that I will abide by all the Rules, Regulations, and Code of Conduct of your company.
- I have read, understood and hereby agree to the terms and conditions stipulated on the brochure, enrollment form and on Kaplan Financial's website.
- I have met the system requirements of the eLearning platform and the testing result is satisfactory.
- I wish to receive Kaplan Information by email in the future.

Signature \_\_\_\_\_

Date \_\_\_\_\_

## FOR OFFICIAL USE ONLY:

F-SO: \_\_\_\_\_ ST2000: \_\_\_\_\_ PY: \_\_\_\_\_ HK\$: \_\_\_\_\_ App#: \_\_\_\_\_ Date: \_\_\_\_\_ Handler: \_\_\_\_\_



## Important

In order to ensure your order is processed, you are asked to ensure that you (1) read the details on the brochure and order form, (2) provide all the information required and (3) submit all the necessary document required in support of your order. We strongly advise you to submit your order form as early as possible. This will enable us to process it more quickly. Products will not be reserved for incomplete order package returned to Kaplan.

Kaplan requires students to conduct themselves in accordance with the standards of their future professions. You can find students' responsibilities information at <https://www.kaplan.com.hk/code-of-conduct>.

## Payment Methods

- 1) VISA/ Master / Amex Card  
Payment can be made in person, by fax, email or by mail (see address at the bottom) or via online store.  
Interest-free installment: For transaction over \$6,000. Payment has to be made in person. Cardholders of HSBC/SC VISA / Mastercard and selected Amex Cards can enjoy a 3/6-month (HSBC/SC) or 12-month (Amex) interest-free installment for course fees of \$6,000 or above in single payment. The cardholder has to be the student himself/herself. Amex Cardholders, please call us first at +852 2526 3686 to check your credit card eligibility.
- 2) Cash / EPS  
Fees can be paid by cash or EPS at our E-Tech Centre Campus.
- 3) Cheque  
Fees can be paid by crossed cheque made payable to "Kaplan Financial (HK) Limited". Please mail the cheque and all required documents to us. Kaplan will not be responsible for any loss of payment sent by mail. If you are enrolling a course that will commence in less than 7 working days, you are advised against using cheque in view of delay arising from postage delay and bank clearance.
- 4) FPS / PayMe  
Fees can be paid by FPS or PayMe at our E-Tech Centre Campus or via our online store (<https://store.kaplan.com.hk/>).

## Terms and Conditions

Terms and Conditions are subject to change without notice. Please review the full and most updated version from our website [www.kaplan.com.hk/kfm](http://www.kaplan.com.hk/kfm) periodically. All matters and disputes will be subject to the final decision of Kaplan. These Terms and Conditions set out your entire agreement with Kaplan Financial for the particular course and supersede all previous agreements or understandings made (verbally or in writing) in relation to the course.

### Enrollment Policy

1. A completed order form must be accompanied by payment in full.

### Cancellation Policy

2. Cost of any course notes, Kaplan Schweser products and financial calculator are not refundable.
3. Any request for refund due to extenuating personal reasons will be considered and determined on a case by case basis, upon presentation of supporting documentation. The common extenuating reasons are illness, accident, pregnancy and bereavement.
4. The following reasons will not be grounds for refund: students' financial circumstances, failure to register for an exam, taking the exam in a later exam sitting, not pursuing the designation, change of work circumstances (i.e. job, location, working hours, obligations etc), difficulty level of course not suitable, dislike of trainer's presentation style.

### Copyright Policy

5. All class materials are for the sole use by registered students only. All materials, in whole or in part, may not be reproduced, shared, rent, copied or transmitted in any format or by any means, electronic or mechanical, including photocopying, recording, or by any information storage and retrieval system, without written permission from Kaplan Financial. The unauthorized duplication of class materials is a violation of global copyright laws.
6. Video or audio recording devices are prohibited under any circumstances.

### Kaplan Schweser Purchase

7. Sales of all products are final, non-refundable and non-returnable once order is placed and payment received.
8. Schweser study materials are protected by the laws of copyright of the United States and other countries throughout the world. Unauthorized creation, purchase, photocopy (i.e. pirated, illicit copies), scanning, use and transmitting of these materials, or portions thereof, in any form whatsoever, is a violation of the copyright law. Violators will be reported to the police and HK Customs and Excise Department where they may subject to criminal and civil liability.
9. The Schweser materials purchased are to be used for the purchaser's own personal use and benefit. Unauthorized commercial resale of Schweser materials is prohibited. Shared use of paper materials, and Online Access is prohibited. All products are non-transferrable. Users must not share the username and password with anyone. Schweser reserves all its rights in the event of a violation of this policy, which may include suspension of purchaser's privileges and enforcement of Schweser's right under law and equity.
10. After the order is successfully processed, you will receive login information assigned by Kaplan Schweser within seven working days. It is a limited license to use the content only between the times of access is granted and the end of the month after the exam of your enrolled semester. Kaplan bears no responsibility to extend the access period, regardless of purchasers actual exam date.
11. Schweser does not warrant that Online Access will be uninterrupted or error-free. Online access to [www.schweser.com](http://www.schweser.com) is provided on an "as is, as available" basis. You agree to meet the minimum system requirements set forth for Kaplan Schweser's electronic products.
12. Date of collection is subject to availability of different materials. Purchasers must present official receipt to collect the materials before the exam date of your enrolled semester.
13. Repeating discounts cannot be combined with any other offers, discounts or promotions. Candidates must present the required supporting documents at the time order is placed.

### Feedback Mechanism

14. Kaplan Financial encourages constructive feedback on all aspects about the quality of teaching and learning. Throughout the course, if students are not satisfied about our course or services, students are advised to write to the Course Director with full descriptions and evidence. Kaplan Financial will take reasonable and prompt action to try to resolve your concerns. Complaints that are lacking in substance and not made in good faith will not be taken.
15. A course evaluation will be administered at the end of the course.

### Ethics and Standards of Professional Conduct

16. Kaplan Financial and Schweser reserve the right to report any cases of misconduct, dishonesty, fraud or deceit to CFA Institute, other professional and government bodies. This can result in disciplinary action that may include in a delay in or a permanent suspension of student's participation in Kaplan Financial; also may impact on your membership and certification with CFA Institute.
17. If students see any suspicious act of unauthorized recording or illegal attendance during the class, please alert our staff. Kaplan Financial reserves our right to report any case found to the Police and relevant professional bodies, including but not limited to CFA Institute.

### Education Bureau Required Disclaimer

18. It is a matter of discretion for individual employers to recognize any qualification to which this course may lead.

### Personal Data Protection

19. If you do not wish to receive our offers and updates, please email us at [hkmarketing.kf@kaplan.com](mailto:hkmarketing.kf@kaplan.com) to unsubscribe.

### Code of Conduct

20. It is the responsibility of every student to be aware of the Kaplan Hong Kong Code of Conduct's content as published in <http://www.kaplan.com.hk/code-of-conduct> and to abide by its provisions.

## Kaplan Financial (HK) Limited

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