



KAPLAN
SCHWESER

CFA® PROGRAM 2024

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 :≥90%

FREE REJOIN PASS[^]

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

ONLINE STORE SPECIAL

EXTRA UP TO \$300 OFF
(LIMITED OFFER)
WITH PROMOTIONAL CODE:

AUG CFA2024AUG
NOV CFA2024NOV



Enroll Now

WIN-WIN REFERRAL PROGRAM

GET \$1,000 UP TOGETHER



FREE WELCOME GIFT

Register with Customer Service
and like our channels now!



Facebook : kfmhk
Instagram : kaplanhk_fm

**SOCIAL MEDIA
OFFER**

[^]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.

Kaplan Financial (HK) Limited

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

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Fax: (852) 2501 0589 | www.kaplan.com.hk/kfm

kfmhk kaplanhk_fm (852) 5628 8939

Got Qs?



> Scan it <

THE CFA® PROGRAM

CFA® Program
Chartered Financial Analyst

Kaplan is a member of the CFA Institute Approved Prep Provider Program.

CFA® 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.

Enter the CFA® Program

U.S. Bachelor Degree
(or equivalent)

OR

Within 23 months
from graduation of Bachelor Degree Program

OR

4 Years Full Time Professional Work*

*Not necessary investment related

Valid International Travel Passport
+
Meet the Professional Conduct Admission Criteria

BECOME THE CHARTERHOLDER

Pass 3 Levels of Exams



4000 hours Relevant Work Experience

In minimum of 36 months Accumulated before, during or after the exam



2-3 professional references

For CFA Institute & society membership application



Become Regular Member of CFA Institute



Maintain Charterholder Status

CFA® PROGRAM 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

International standard for measuring competence and integrity; clients and colleagues regard charterholders with a presumption of expertise

CAREER ENHANCING

Represents a mark of quality, proof that you have mastered a rigorous curriculum and possessed a broad range of investment knowledge; a “passport” for entry to or advancement within the profession

ESSENTIAL KNOWLEDGE

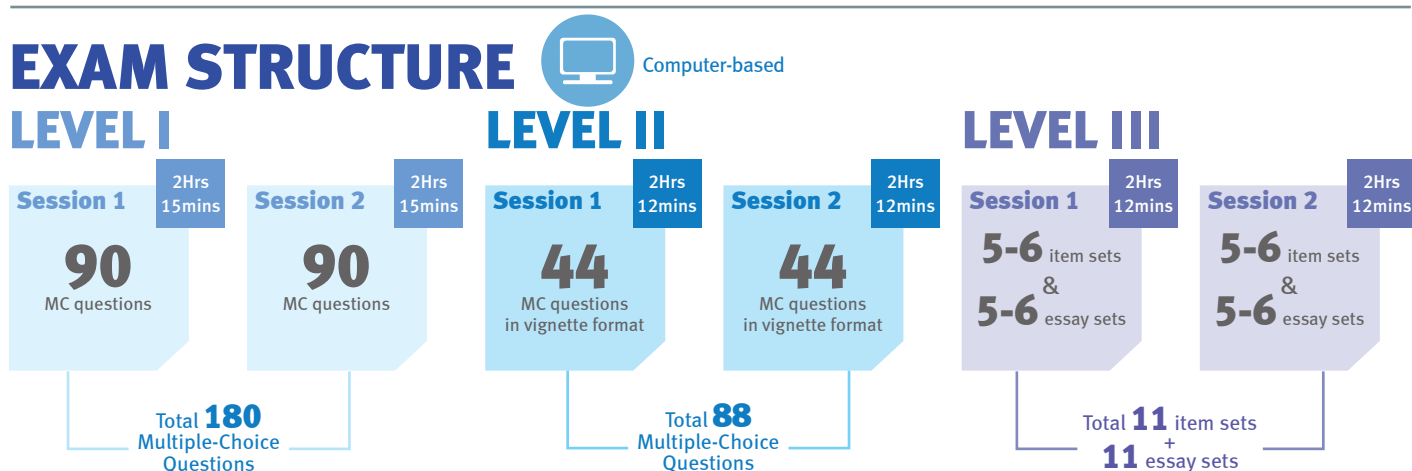
Focuses on knowledge based on current industry practice, anticipated future trends and competencies essential to practice in the investment profession

GLOBAL NETWORK

Instant access to a global network of financial professionals

CFA Institute does not endorse, promote, or warrant the accuracy or quality of the products or services offered by Kaplan. CFA Institute, CFA® and the Chartered Financial Analyst® are trademarks owned by CFA Institute.

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.



Topic Area Weights

Exam Topic	LEVEL I	LEVEL II	LEVEL III
Ethical and Professional Standards	15-20%	10-15%	10-15%
Quantitative Methods	6-9%	5-10%	-
Economics	6-9%	5-10%	5-10%
Financial Statement Analysis	11-14%	10-15%	-
Corporate Issuers	6-9%	5-10%	-
Equity Investments	11-14%	10-15%	10-15%
Fixed Income	11-14%	10-15%	15-20%
Derivatives	5-8%	5-10%	5-10%
Alternative Investments	7-10%	5-10%	5-10%
Portfolio Management and Wealth Planning	8-12%	10-15%	35-40%

CFA EXAM COST & EXAM CYCLE

Exam Period	Exam Level	Exam Registration			Exam Dates
		Registration Window Opens	Early Registration Deadline	Registration Closes	
Feb	Level I	16/05/23	13/07/23	08/11/23	19 - 25/02/24
	Level III				15 - 18/02/24
May	Level I	15/08/23	12/10/23	06/02/24	15 - 21/05/24
	Level II				22 - 26/05/24
Aug	Level I	14/11/23	23/01/24	14/05/24	20 - 26/08/24
	Level II				27 - 31/08/24
	Level III				16 - 19/08/24
Nov	Level I	08/02/24	16/04/24	07/08/24	13 - 19/11/24
	Level II				20 - 24/11/24

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.

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



MOST EFFECTIVE 3-PHASE LEARNING APPROACH

EDUCATION

4-6 Months
before exam

Learn new facts, concepts, processes, procedures, and principles

17 - 20

Sessions

51-60
hrs

REVISION

1 - 2 Months
before exam

Retain and remediate new knowledge through application

9

Sessions

27
hrs

MOCK

2 - 4 Weeks
before exam

Evaluate retention and application of new knowledge

Mock
Exam

4 hrs
24 -30
mins

Mock
Review

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)

Schweser Essential Package (Online)

- Optional add-on at HK\$3,500 up (Original HK\$5,300 up)



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

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)

ONLINE ACCESS & SUPPORTING SERVICES

Online Pre-Course (enroll by Early Bird Deadline)

- 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 ^

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

Online Catch-up Video ^

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

Swap Class ^

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

Pre-requisite Reading Video (Level I only)

Live Streaming ^

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

Online Catch-up Video ^

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

Swap Class ^ (2 sessions)

- Catch up missed lectures by swapping to another class

Live Streaming ^

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

Online Catch-up Video ^

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

Private Tutoring

- 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

Contact us for assessment and price quote

Tel: (852) 2526 3686 | Email: hkcfa@kaplan.com



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 2024 Full Package

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



Sit For/ Postpone The Exam

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



Rejoin Our Course

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 **Aug/ Nov** 2024 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.

For students who enrolled in CFA Feb/ May 2024 Full Package, you are entitled to apply the Free Online Access Extension, for details, please go to <https://bit.ly/49d3ndV>.

Terms and Conditions apply.

Trainers' Profile

Dr. Kyle Wong

PhD(Cornell), CFA, FRM

- Over 15 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 IPS 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. Larry Yuen

MSc Risk Management Science (CUHK),
MSc (ECom&IComp) (HKU),
MFE (Lond), CFA, CAIA, FCA

- All-round trainer with extensive experience in finance, risk management and accounting
- Over 20 years of experience in the financial industry spanning across wealth management and capital markets
- Held senior positions at Citi, Deutsche Bank, ABN Amro, ING and Schroder
- Expertise in portfolio management and fund management
- Experienced trainer in delivering master-level finance courses
- Numerous real-life examples to illustrate and solidify concepts



Demo Lecture



MORE VIDEOS ON YOUTUBE CHANNEL !

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 marco 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



AVERAGE RATING OF TRAINERS#

#Jun 2017-2023 Statistics



THE CFA® PROGRAM

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

”

“

I have passed CFA Level 1 exam with **total grade among the top 10% of global candidates**.

Sincere thanks to my trainer for his **great teaching** and to Kaplan for the extremely **excellent course design and course materials**. Without the help of Kaplan and my trainer, I might not be able to achieve this result at all.

Esther Liu Yangzi
Level I Alumni

”



**OF OUR STUDENTS SAID
KAPLAN'S CFA®
EXAM PREP IS USEFUL
(2018 - 2022 SURVEY RESULT)**

**HEAR WHAT OUR
STUDENTS SAY**



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

1

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

Level II & III:

9 hours of instruction extracted from 2023 exam season

2

Add-on Schweser Essential Package at discounted price

For product availability, please scan QR code.



Enroll Full Package and get a set of 2024 Schweser Essential Package at discounted price



FAQ

Q: 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 on or before early bird deadline. 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/>.

Q: 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. Please beware of the exam registration deadline indicated on CFA Institute Official Website.

Q: 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.

Q: 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 and Swap Class Service are here to prevent you from missing any classes. Contact our Customer Service Officer and request:

Swap Class Service

Catch up missed session by swapping to another class. Up to 6 sessions for Level I and 5 sessions for Level II & III Education Program and 2 sessions for all three levels (Revision Course).

Catch-up Videos

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

Q: 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.

Q: 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 Classroom Program** has helped thousands of candidates to prepare for the exam in the traditional way.

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

Q: 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.

Q: 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.

Q: I want to know more about the exam. Where can I find more information?

Please contact CFA Institute, contact details as below.

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
Tel: +1 (434)951-5499
Fax: +1 (434) 951-5262
Website: www.cfainstitute.org
(login to submit inquiry at website)

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 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 \$300 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 \$300 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. \$50 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

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.

Class Materials and Stationery

28. Class materials will be distributed on regular intervals – first on the first day of course and also during the progression of the course.
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 Instrument 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.

eLearning

34. Enrollment to eLearning 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. Course materials will be released in milestones. You are required to collect the course material including course slide pack 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 course materials that are returned to us.
36. 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.
37. 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.
38. 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.
39. 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

40. Sales of all products are final, non-refundable and non-returnable once order is placed and payment received.
41. 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 be subject to criminal and civil liability.
42. 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.
43. 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.
44. Schweser does not warrant that Online Access will be uninterrupted or error-free. Online access to 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.
45. 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.
46. 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's 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

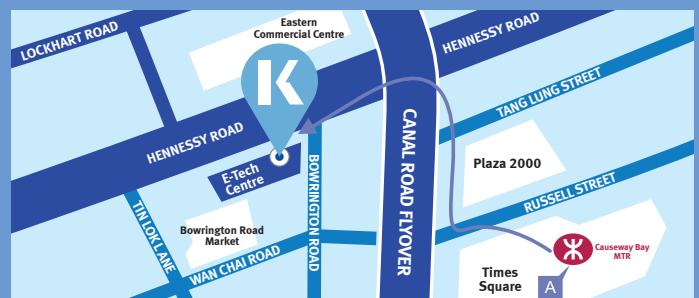
52. If you do not wish to receive our offers and updates, please email us at hkmarketing.kf@kaplan.com to unsubscribe.

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 Aug/ Nov 2024 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.
61. 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 enrollment.
62. The Rejoin Pass is non-transferable and cannot be sold, exchanged, or redeemed for cash.
63. 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.
64. Kaplan does not guarantee that rejoining the exam preparation course will result in improved exam performance or passing the public exam.



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Email : hkcf@kaplan.com
www.kaplan.com.hk/kfm

CFA LEVEL I - COURSE SCHEDULE

EDUCATION PROGRAM

60 hours

20 sessions

	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up			ONLINE	
	TRAINER ▶	J. LAM CANTONESE	J. Lam will deliver the session via Live-streaming from other region.		KYLE WONG CANTONESE
	DATE	DAY	TIME	DATE	DATE
1 Quantitative Methods**	09/01/24	Tue	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	11/01/24	Thu	19:00 - 22:00		
3 Quantitative Methods + Online Progress Test Release	16/01/24	Tue	19:00 - 22:00		
4 Financial Statement Analysis**	18/01/24	Thu	19:00 - 22:00		
5 Financial Statement Analysis	23/01/24	Tue	19:00 - 22:00		
6 Financial Statement Analysis	25/01/24	Thu	19:00 - 22:00		
7 Financial Statement Analysis	30/01/24	Tue	19:00 - 22:00		
8 Financial Statement Analysis + Online Progress Test Release	01/02/24	Thu	19:00 - 22:00		
9 Portfolio Management	06/02/24	Tue	19:00 - 22:00		
10 Portfolio Management + Corporate Issuers	15/02/24	Thu	19:00 - 22:00		
11 Corporate Issuers	20/02/24	Tue	19:00 - 22:00		
12 Equity	22/02/24	Thu	19:00 - 22:00		
13 Equity + Online Progress Test Release	27/02/24	Tue	19:00 - 22:00		
14 Fixed Income	29/02/24	Thu	19:00 - 22:00		
15 Fixed Income	05/03/24	Tue	19:00 - 22:00		
16 Derivatives	07/03/24	Thu	19:00 - 22:00		
17 Derivatives + Alternative Investments + Online Progress Test Release	12/03/24	Tue	19:00 - 22:00		
18 Economics**	14/03/24	Thu	19:00 - 22:00		
19 Economics + Online Progress Test Release	19/03/24	Tue	19:00 - 22:00		
20 Ethical and Professional Standards + Online Progress Test Release	21/03/24	Thu	19:00 - 22:00		

REVISION COURSE

27 hours

9 sessions

	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up			ONLINE	
	TRAINER ▶	J. LAM CANTONESE	J. Lam will deliver the session via Live-streaming from other region.		KYLE WONG CANTONESE
	DATE	DAY	TIME	DATE	DATE
1 Quantitative Methods**	28/03/24	Thu	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**	02/04/24	Tue	19:00 - 22:00		
3 Financial Statement Analysis	09/04/24	Tue	19:00 - 22:00		
4 Portfolio Management + Corporate Issuers	11/04/24	Thu	19:00 - 22:00		
5 Corporate Issuers + Alternative Investments	16/04/24	Tue	19:00 - 22:00		
6 Equity	18/04/24	Thu	19:00 - 22:00		
7 Fixed Income	23/04/24	Tue	19:00 - 22:00		
8 Derivative Investments + Economics**	25/04/24	Thu	19:00 - 22:00		
9 Economics + Ethical and Professional Standards	30/04/24	Tue	19:00 - 22:00		

ONLINE MOCK 4.5 hours

DATE	DAY	TIME
04/05/24	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
	09/05/24	Thu	19:00 - 22:00	07/05/24	07/05/24

CFA LEVEL I - COURSE FEES (MAY 2024)

Enroll by 2 Jan 2024 to Save 17% 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 PRICEORIGINAL
PRICE

\$9,950

\$12,000

enroll by 02/01/24



Add-on (Optional)

Get a set of 2024 Schweser Essential Package (Online) at HK\$3,500 (Retail Price HK\$5,300) 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 by 23 Mar 2024 to Save 16% on Revision Course

Revision Course



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

EARLY
BIRD PRICEORIGINAL
PRICE

\$5,460

\$6,500

enroll by 23/03/24

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

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 Interest-free 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:

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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

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CFA LEVEL II - COURSE SCHEDULE

EDUCATION PROGRAM

54 hours

18 sessions

	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up					
TRAINER ►	KYLE WONG CANTONESE			JONATHAN LAU ENGLISH		
	DATE	DAY	TIME	DATE	DAY	TIME
1 Ethical and Professional Standards + Financial Statement Analysis	20/01/24	Sat	10:00 - 13:00	25/01/24	Thu	19:00 - 22:00
2 Financial Statement Analysis	20/01/24	Sat	14:00 - 17:00	01/02/24	Thu	19:00 - 22:00
3 Financial Statement Analysis + Online Progress Test Release	27/01/24	Sat	10:00 - 13:00	03/02/24	Sat	10:00 - 13:00
4 Corporate Issuers	27/01/24	Sat	14:00 - 17:00	03/02/24	Sat	14:00 - 17:00
5 Corporate Issuers	03/02/24	Sat	10:00 - 13:00	24/02/24	Sat	10:00 - 13:00
6 Quantitative Methods	03/02/24	Sat	14:00 - 17:00	24/02/24	Sat	14:00 - 17:00
7 Quantitative Methods	17/02/24	Sat	10:00 - 13:00	29/02/24	Thu	19:00 - 22:00
8 Economics	17/02/24	Sat	14:00 - 17:00	02/03/24	Sat	10:00 - 13:00
9 Economics + Portfolio Management + Online Progress Test Release	24/02/24	Sat	10:00 - 13:00	02/03/24	Sat	14:00 - 17:00
10 Portfolio Management	24/02/24	Sat	14:00 - 17:00	09/03/24	Sat	10:00 - 13:00
11 Equity	02/03/24	Sat	10:00 - 13:00	09/03/24	Sat	14:00 - 17:00
12 Equity	02/03/24	Sat	14:00 - 17:00	16/03/24	Sat	10:00 - 13:00
13 Equity + Alternative Investments	09/03/24	Sat	10:00 - 13:00	16/03/24	Sat	14:00 - 17:00
14 Alternative Investments + Online Progress Test Release	09/03/24	Sat	14:00 - 17:00	23/03/24	Sat	10:00 - 13:00
15 Fixed Income	16/03/24	Sat	10:00 - 13:00	23/03/24	Sat	14:00 - 17:00
16 Fixed Income	16/03/24	Sat	14:00 - 17:00	28/03/24	Thu	19:00 - 22:00
17 Derivatives	23/03/24	Sat	10:00 - 13:00	06/04/24	Sat	10:00 - 13:00
18 Derivatives + Online Progress Test Release	23/03/24	Sat	14:00 - 17:00	06/04/24	Sat	14:00 - 17:00

REVISION COURSE

27 hours

9 sessions

	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up					
TRAINER ►	KYLE WONG CANTONESE			JONATHAN LAU ENGLISH		
	DATE	DAY	TIME	DATE	DAY	TIME
1 Financial Statement Analysis	03/04/24	Wed	19:00 - 22:00	11/04/24	Thu	19:00 - 22:00
2 Financial Statement Analysis	14/04/24	Sun	10:00 - 13:00	13/04/24	Sat	10:00 - 13:00
3 Corporate Issuers	14/04/24	Sun	14:00 - 17:00	13/04/24	Sat	14:00 - 17:00
4 Quantitative Methods	21/04/24	Sun	10:00 - 13:00	20/04/24	Sat	10:00 - 13:00
5 Equity	21/04/24	Sun	14:00 - 17:00	20/04/24	Sat	14:00 - 17:00
6 Alternative Investments	28/04/24	Sun	10:00 - 13:00	27/04/24	Sat	10:00 - 13:00
7 Fixed Income	28/04/24	Sun	14:00 - 17:00	27/04/24	Sat	14:00 - 17:00
8 Derivatives	05/05/24	Sun	10:00 - 13:00	04/05/24	Sat	10:00 - 13:00
9 Portfolio Management + Economics + Ethics	05/05/24	Sun	14:00 - 17:00	04/05/24	Sat	14:00 - 17:00

ONLINE MOCK 4hrs 24mins

DATE	DAY	TIME
11/05/24	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			JONATHAN LAU ENGLISH		
DATE	DAY	TIME	DATE	DAY	TIME
13/05/24	Mon	19:00 - 22:00	14/05/24	Tue	19:00 - 22:00

CFA LEVEL II - COURSE FEES (MAY 2024)

Enroll by 13 Jan 2024 to Save 14% 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

ORIGINAL
PRICE

\$13,950
enroll by 13/01/24

\$16,400



Add-on (Optional)

Get a set of 2024 Schweser Essential Package (Online) at HK\$3,650 (Retail Price HK\$5,600) 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 by 23 Mar 2024 to Save 20% on Revision Course

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

\$7,600
enroll by 23/03/24

\$9,500

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

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 Interest-free Installment Plan. Please check with Kaplan for details.

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Level II:
9 hours instruction extracted from 2023 exam season

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CFA LEVEL I - COURSE SCHEDULE

EDUCATION PROGRAM

60 hours

20 sessions

	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up			ONLINE	
	TRAINER ▶	KYLE WONG CANTONESE		J. LAM CANTONESE	JONATHAN LAU ENGLISH
	DATE	DAY	TIME	DATE	DATE
1 Quantitative Methods **	20/04/24	Sat	10:00 - 13:00	Video will be released by phases from Mid Jan to Late Mar	All videos are available now
2 Quantitative Methods	20/04/24	Sat	14:00 - 17:00		
3 Quantitative Methods + Online Progress Test Release	27/04/24	Sat	10:00 - 13:00		
4 Financial Statement Analysis **	27/04/24	Sat	14:00 - 17:00		
5 Financial Statement Analysis	04/05/24	Sat	10:00 - 13:00		
6 Financial Statement Analysis	04/05/24	Sat	14:00 - 17:00		
7 Financial Statement Analysis + Online Progress Test Release	11/05/24	Sat	10:00 - 13:00		
8 Portfolio Management	11/05/24	Sat	14:00 - 17:00		
9 Portfolio Management + Corporate Issuers	18/05/24	Sat	10:00 - 13:00		
10 Corporate Issuers	18/05/24	Sat	14:00 - 17:00		
11 Equity	25/05/24	Sat	10:00 - 13:00		
12 Equity + Online Progress Test Release	25/05/24	Sat	14:00 - 17:00		
13 Fixed Income	08/06/24	Sat	10:00 - 13:00		
14 Fixed Income	08/06/24	Sat	14:00 - 17:00		
15 Fixed Income	15/06/24	Sat	10:00 - 13:00		
16 Derivatives	15/06/24	Sat	14:00 - 17:00		
17 Derivatives + Alternative Investments + Online Progress Test Release	22/06/24	Sat	10:00 - 13:00		
18 Economics **	22/06/24	Sat	14:00 - 17:00		
19 Economics + Online Progress Test Release	29/06/24	Sat	10:00 - 13:00		
20 Ethical and Professional Standards + Online Progress Test Release	29/06/24	Sat	14:00 - 17:00		

REVISION COURSE

27 hours

9 sessions

	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up			ONLINE	
	TRAINER ▶	KYLE WONG CANTONESE		J. LAM CANTONESE	JONATHAN LAU ENGLISH
	DATE	DAY	TIME	DATE	DATE
1 Quantitative Methods **	03/07/24	Wed	19:00 - 22:00	Video will be released by phases from Early Apr to Early May	Video will be released by phases from Mid Jan to Early Feb
2 Financial Statement Analysis **	06/07/24	Sat	10:00 - 13:00		
3 Financial Statement Analysis	06/07/24	Sat	14:00 - 17:00		
4 Portfolio Management + Corporate Issuers	13/07/24	Sat	10:00 - 13:00		
5 Corporate Issuers + Alternative Investments	13/07/24	Sat	14:00 - 17:00		
6 Equity	17/07/24	Wed	19:00 - 22:00		
7 Fixed Income	24/07/24	Wed	19:00 - 22:00		
8 Derivative Investments + Economics **	03/08/24	Sat	10:00 - 13:00		
9 Economics + Ethical and Professional Standards	03/08/24	Sat	14:00 - 17:00		

ONLINE MOCK 4.5 hours

DATE	DAY	TIME
10/08/24	Sat	10:00 - 12:15 & 12:45 - 15:00

MOCK EXAM REVIEW 3 hours

CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up			ONLINE	
KYLE WONG CANTONESE			J. LAM CANTONESE	JONATHAN LAU ENGLISH
DATE	DAY	TIME	DATE	DATE
15/08/24	Thu	19:00 - 22:00	11/08/24	11/08/24

**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.

CFA LEVEL I - COURSE FEES (AUG 2024)

Enroll by 19 Apr 2024 to Save 17% 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 PRICEORIGINAL
PRICE\$9,950
enroll by 19/04/24

\$12,000



Add-on (Optional)

Get a set of 2024 Schweser Essential Package (Online) at HK\$3,500 (Retail Price HK\$5,300) 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 by 26 Jun 2024 to Save 16% on Revision Course

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 PRICEORIGINAL
PRICE\$5,460
enroll by 26/06/24

\$6,500

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

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.

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Facebook : kfmhk
Instagram : kaplanhk_fm

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 BAI+ Calculator tips

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CFA LEVEL II - COURSE SCHEDULE

EDUCATION PROGRAM

54 hours

18 sessions

ONLINE		
TRAINER ▶	KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
	DATE	DATE
1 Ethical and Professional Standards + Financial Statement Analysis	Video will be released by phases from Early Feb to Mid Apr	Video will be released by phases from Early Feb to Mid Apr
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

27 hours

9 sessions

ONLINE		
TRAINER ▶	KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
	DATE	DATE
1 Financial Statement Analysis	Video will be released by phases from Mid Apr to Mid May	Video will be released by phases from Mid Apr to Mid May
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 4hrs 24mins

DATE	DAY	TIME
17/08/24	Sat	10:00 - 12:12 & 12:42 - 14:54

MOCK EXAM REVIEW

3 hours

ONLINE	
KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
DATE	DATE
18/08/24	18/08/24

CFA LEVEL II - COURSE FEES (AUG 2024)

Enroll by 19 Apr 2024 to Save 14% on Full Package

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Education + Revision + Mock & Review



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EARLY BIRD PRICE

\$13,950
enroll by 19/04/24

ORIGINAL PRICE

\$16,400



Add-on (Optional)

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Enroll by 26 Jun 2024 to Save 20% on Revision Course

Revision Course



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EARLY BIRD PRICE

\$7,600
enroll by 26/06/24

ORIGINAL PRICE

\$9,500

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CFA LEVEL III - COURSE SCHEDULE

EDUCATION PROGRAM

51 hours

17 sessions

		CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up		
TRAINER ▶		KYLE WONG CANTONESE		
		DATE	DAY	TIME
1	Capital Market Expectations	23/04/24	Tue	19:00 - 22:00
2	Capital Market Expectations	25/04/24	Thu	19:00 - 22:00
3	Asset Allocation + Online Progress Test Release	30/04/24	Tue	19:00 - 22:00
4	Derivatives	02/05/24	Thu	19:00 - 22:00
5	Currency Management	07/05/24	Tue	19:00 - 22:00
6	Fixed Income	09/05/24	Thu	19:00 - 22:00
7	Fixed Income + Online Progress Test Release	14/05/24	Tue	19:00 - 22:00
8	Equity	16/05/24	Thu	19:00 - 22:00
9	Equity + Alternative Investments	21/05/24	Tue	19:00 - 22:00
10	Alternative Investments	23/05/24	Thu	19:00 - 22:00
11	Private Wealth Management	04/06/24	Tue	19:00 - 22:00
12	Private Wealth Management + Online Progress Test Release	06/06/24	Thu	19:00 - 22:00
13	Institutional Investors	11/06/24	Tue	19:00 - 22:00
14	Trading	13/06/24	Thu	19:00 - 22:00
15	Portfolio Performance Evaluation	18/06/24	Tue	19:00 - 22:00
16	Investment Manager Selection and Case Studies	20/06/24	Thu	19:00 - 22:00
17	Ethical and Professional Standards + GIPS + Online Progress Test Release	25/06/24	Tue	19:00 - 22:00

REVISION COURSE

27 hours

9 sessions

		CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up		
TRAINER ▶		KYLE WONG CANTONESE		
		DATE	DAY	TIME
1	Capital Market Expectation	02/07/24	Tue	19:00 - 22:00
2	Asset Allocation	04/07/24	Thu	19:00 - 22:00
3	Derivatives + Currency Management	09/07/24	Tue	19:00 - 22:00
4	Fixed Income	11/07/24	Thu	19:00 - 22:00
5	Equity + Alternative Investments	16/07/24	Tue	19:00 - 22:00
6	Private Wealth Management	18/07/24	Thu	19:00 - 22:00
7	Private Wealth Management + Institutional Investors	23/07/24	Tue	19:00 - 22:00
8	Portfolio Performance Evaluation + Investment Manager Selection	25/07/24	Thu	19:00 - 22:00
9	Ethics and GIPS	30/07/24	Tue	19:00 - 22:00

ONLINE MOCK 4hrs24mins

DATE	DAY	TIME
03/08/24	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
13/08/24	Tue	19:00 - 22:00

CFA LEVEL III - COURSE FEES (AUG 2024)

Enroll by 19 Apr 2024 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

\$14,600
enroll by 19/04/24

ORIGINAL PRICE

\$17,200

Add-on (Optional)

Get a set of 2024 Schweser Essential Package (Online) at HK\$3,850 (Retail Price HK\$5,900) 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 by 26 Jun 2024 to Save 20% on Revision Course

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

\$8,720
enroll by 26/06/24

ORIGINAL PRICE

\$10,900

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

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 Interest-free Installment Plan. Please check with Kaplan for details.

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AUG CFA2024AUG



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Online pre-course

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

Level III:
9 hours instruction extracted from 2023 exam season

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CFA LEVEL I - COURSE SCHEDULE

EDUCATION PROGRAM

60 hours

20 sessions

	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up			ONLINE	
	TRAINER ▶	J. LAM CANTONESE	J. Lam will deliver the session via Live-streaming from other region.		KYLE WONG CANTONESE
	DATE	DAY	TIME	DATE	DATE
1 Quantitative Methods **	18/07/24	Thu	19:00 - 22:00	All videos are available now	All videos are available now
2 Quantitative Methods	23/07/24	Tue	19:00 - 22:00		
3 Quantitative Methods + Online Progress Test Release	25/07/24	Thu	19:00 - 22:00		
4 Financial Statement Analysis **	30/07/24	Tue	19:00 - 22:00		
5 Financial Statement Analysis	01/08/24	Thu	19:00 - 22:00		
6 Financial Statement Analysis	06/08/24	Tue	19:00 - 22:00		
7 Financial Statement Analysis + Online Progress Test Release	08/08/24	Thu	19:00 - 22:00		
8 Portfolio Management	13/08/24	Tue	19:00 - 22:00		
9 Portfolio Management + Corporate Issuers	15/08/24	Thu	19:00 - 22:00		
10 Corporate Issuers	20/08/24	Tue	19:00 - 22:00		
11 Equity	22/08/24	Thu	19:00 - 22:00		
12 Equity + Online Progress Test Release	27/08/24	Tue	19:00 - 22:00		
13 Fixed Income	29/08/24	Thu	19:00 - 22:00		
14 Fixed Income	03/09/24	Tue	19:00 - 22:00		
15 Fixed Income	05/09/24	Thu	19:00 - 22:00		
16 Derivatives	10/09/24	Tue	19:00 - 22:00		
17 Derivatives + Alternative Investments + Online Progress Test Release	12/09/24	Thu	19:00 - 22:00		
18 Economics **	19/09/24	Thu	19:00 - 22:00		
19 Economics + Online Progress Test Release	24/09/24	Tue	19:00 - 22:00		
20 Ethical and Professional Standards + Online Progress Test Release	26/09/24	Thu	19:00 - 22:00		

REVISION COURSE

27 hours

9 sessions

	CLASSROOM + ONLINE Classroom + Live Streaming + Online Catch up			ONLINE	
	TRAINER ▶	J. LAM CANTONESE	J. Lam will deliver the session via Live-streaming from other region.		KYLE WONG CANTONESE
	DATE	DAY	TIME	DATE	DATE
1 Quantitative Methods**	03/10/24	Thu	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**	08/10/24	Tue	19:00 - 22:00		
3 Financial Statement Analysis	10/10/24	Thu	19:00 - 22:00		
4 Portfolio Management + Corporate Issuers	15/10/24	Tue	19:00 - 22:00		
5 Corporate Issuers + Alternative Investments	17/10/24	Thu	19:00 - 22:00		
6 Equity	22/10/24	Tue	19:00 - 22:00		
7 Fixed Income	24/10/24	Thu	19:00 - 22:00		
8 Derivative Investments + Economics**	29/10/24	Tue	19:00 - 22:00		
9 Economics + Ethical and Professional Standards	31/10/24	Thu	19:00 - 22:00		

ONLINE MOCK 4.5 hours

DATE	DAY	TIME
02/11/24	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
	07/11/24	Thu	19:00 - 22:00	03/11/24	03/11/24

CFA LEVEL I - COURSE FEES (NOV 2024)

Enroll by 17 Jul 2024 to Save 17% 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****\$9,950**
enroll by 17/07/24**ORIGINAL
PRICE****\$12,000****Add-on (Optional)**

Get a set of 2024 Schweser Essential Package (Online) at HK\$3,500 (Retail Price HK\$5,300) 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 by 26 Sep 2024 to Save 16% on Revision Course

Revision Course

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

**EARLY
BIRD PRICE****\$5,460**
enroll by 26/09/24**ORIGINAL
PRICE****\$6,500**

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

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 Interest-free Installment Plan. Please check with Kaplan for details.

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WITH PROMOTIONAL CODE:

**CFA2024NOV**

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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 BAI+ Calculator tips

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CFA LEVEL II - COURSE SCHEDULE

EDUCATION PROGRAM

54 hours

18 sessions

	ONLINE	
TRAINER ►	KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
	DATE	DATE
1 Ethical and Professional Standards + Financial Statement Analysis	Video will be released by phases from Early Feb to Mid Apr	Video will be released by phases from Early Feb to Mid Apr
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

27 hours

9 sessions

	ONLINE	
TRAINER ►	KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
	DATE	DATE
1 Financial Statement Analysis	Video will be released by phases from Mid Apr to Mid May	Video will be released by phases from Mid Apr to Mid May
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 4hrs 24mins

DATE	DAY	TIME
09/11/24	Sat	10:00 - 12:12 & 12:42 - 14:54

MOCK EXAM REVIEW

3 hours

ONLINE	
KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
DATE	DATE
10/11/24	10/11/24

CFA LEVEL II - COURSE FEES (NOV 2024)

Enroll by 17 Jul 2024 to Save 14% 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

ORIGINAL
PRICE

\$13,950
enroll by 17/07/24

\$16,400



Add-on (Optional)

Get a set of 2024 Schweser Essential Package (Online) at HK\$3,650 (Retail Price HK\$5,600) 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 by 26 Sep 2024 to Save 20% on Revision Course

Revision Course



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

EARLY
BIRD PRICE

ORIGINAL
PRICE

\$7,600
enroll by 26/09/24

\$9,500

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

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.

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Level II:
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Schweser study solutions are LOS-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\$3,500 - HK\$3,850 within the same exam semester

STUDY PACKAGE

	Ultimate Package	Premium Package	Essential Package [^]
LEVEL I	HK\$11,800	HK\$7,500	HK\$5,300
LEVEL II	HK\$12,100	HK\$7,800	HK\$5,600
LEVEL III	HK\$12,400	HK\$8,100	HK\$5,900

CORE (STUDY TOOLS)

Feature	Availability	Ultimate Package	Premium Package	Essential Package [^]
SchweserNotes™ Vol. 1-5* -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 Exams (1-6)	Online	✓	✓	Mock exam 1-4 only
Resource Library	Online	✓	✓	✓
InstructorLink	Online	✓	✓	✓

INSTRUCTION

Feature	Availability	Ultimate Package	Premium Package	Essential Package [^]
OnDemand Masterclass	Online	✓	✓	✓
Masterclass Workbooks	Print & Online	✓	✓ Online only	✓ Online only
CFA Institute Question Review Videos	Online	✓	✓	✓

FINAL REVIEW

Feature	Availability	Ultimate Package	Premium Package	Essential Package [^]
OnDemand Review Workshop	Online	✓	✓	
Review Workshop Workbooks	Print & Online	✓	✓ Online	
Secret Sauce®*	Print, eBook & Online	✓	✓	

OTHER RESOURCES

Feature	Availability	Ultimate Package	Premium Package	Essential Package [^]
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)

[^]Extra HK\$1,200 for the printed material of SchweserNotes & QuickSheet Kit.

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 and JumpStart online materials.

Schweser Product Availability:
<https://bit.ly/3twppsp>



The Schweser PassProtection™

Receive the online study materials **FREE OF CHARGE** for your next exam sitting*.

You are eligible if you meet the following criteria:

1. Have previously purchased an Essential, Premium, or Ultimate Package.
2. 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 STUDY PACKAGE

Product Details

SchweserNotes™ Vol. 1-5

More than just textbooks. This 5-volume set breaks down the CFA Program curriculum into bite-sized segments that help you master each exam topic.



QuickSheet

This compact study tool summarizes key formulas, definitions, and concepts.



SchweserPro™ Qbank

Prepare with thousands of foundational and exam-like questions, custom quizzes, tutorial videos, detailed explanations, and performance metrics.



Mock Exams (1-6)

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.



OnDemand Masterclass

Masterclass ensures you have a strong grasp on the topic. Led by Schweser's expert instructors, you get 45+ hours of online instruction that reinforces your studies and ensures you're ready to move on to the next topic.



OnDemand Review Workshop

Review exam topics that are causing you trouble, and build exam-day confidence by interacting with a CFA® Program expert in OnDemand sessions.



Secret Sauce®

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

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 40+ 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.

All online products will expire at the end of the month after the exam of your purchased semester. Kaplan Schweser releases a new version of products every year as the curriculum changes.

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