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## CONTINUING EDUCATION

### Co-sponsored Business Programs

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### 2008 CALGARY “LEVEL I CFA® REVIEW SEMINAR” OFFERED BY CONTINUING EDUCATION, THE UNIVERSITY OF CALGARY COURSE NUMBER: 95152

#### INTRODUCTION

To help Level I CFA® candidates in the Calgary area prepare for their upcoming examination, Continuing Education at The University of Calgary, Western Financial Consulting Ltd. (“WFCL”), and Schweser Study Program (“Schweser”) are pleased to present a Level I CFA® review seminar. The purpose of the seminar is to highlight and consolidate the key ideas from the assigned CFA® program readings. As well, the seminar will provide participants with a versatile framework of analysis for each section of the CFA® program. CFA Institute does not endorse, promote, review or warrant the accuracy of the products or services offered by WFCL or verify or endorse the pass rates claimed by WFCL. CFA® and Chartered Financial Analyst® are trademarks owned by CFA Institute (formerly known as AIMR®, or the Association for Investment Management and Research®).

#### SEMINAR STUDY MATERIALS

The review seminar will be based upon the CFA Institute readings augmented by lecture notes and practice problems prepared by the seminar instructors. Additionally, if a seminar participant wishes to purchase study materials from Schweser they will be provided with the opportunity to do so. The Schweser materials will include the 2008 Level 1 Study Note Pack (five study books and Practice Exam Volume 1), Practice Exam Volume 2, SchweserPro Online Question Bank, Free Do-It-Yourself LOS Flashcards, Quicksheet, Faculty Office Hours plus all the online tools (session kick-off, Schweser library, faculty blog, and study planner). Students who purchase the Schweser materials will receive them soon after registration, while additional study materials will be distributed by the instructors during the seminar.

#### FORMAT OF THE REVIEW SEMINAR

The weekly review seminar will cover all the study sessions required for the CFA® exam; however, increased emphasis will be placed on the areas that are given more weight in the exam. For each session, the instructor will hand out detailed lecture notes, review the session’s key topics, and provide examples to illustrate the type of questions that may be asked on the CFA® exam. To provide assistance after the formal class sessions, seminar participants are encouraged to send E-Mail questions to, or to phone, the seminar instructors who will answer all questions in a timely manner.

#### WHO SHOULD ATTEND?

The seminar is directed towards serious CFA® candidates, and all participants are expected to have completed and studied all reading assignments prior to each seminar class. The objective of the seminar is to provide a concentrated forum to ensure that all participants maximize their chance of passing the CFA® exam. Class sizes will be strictly limited to ensure that participants receive the level of attention they require.

#### DATES AND LOCATION

This year's Level I seminar will offer 14 review classes once a week, on Monday evenings, beginning on January 14<sup>th</sup>. Each class will start at 6:30 PM, will end at 9:15 PM, and will be held at The University of Calgary. Please see the attached schedule for a detailed outline of classes. A mock 6-hour CFA® preparation exam will be offered after the scheduled sessions, on April 26<sup>th</sup>, to provide practice in exam writing skills.

### **WHAT BENEFITS DO YOU RECEIVE FROM THIS SEMINAR?**

While the CFA<sup>®</sup> program of study is designed to be a self-study program, many adult learners find that receiving formalized instruction in many of the complex topic areas is beneficial. If you have decided to purchase the Schweser study materials, you will receive them soon after registration. During the course of the seminar, supplementary notes and a set of over 400 sample questions will be provided to test your understanding of the material. In addition, upon registering you will be provided with the opportunity to submit E-Mail questions to the seminar instructors. This tutorial service is available to you prior to the seminar, during the seminar, and even after the seminar.

### **COST AND REGISTRATION INFORMATION**

The cost of registering for the review seminar, without purchasing the Schweser study materials, is \$795 (this price includes GST). If you wish to register for the review seminar and purchase the Schweser study materials the cost will be \$1,095 (this price includes GST). (If you were a participant in a previous offering of our Level I program and were unsuccessful in passing the exam please call Dr. Robinson to discuss a reduced rate). Registrations for the seminar are handled by Continuing Education, The University of Calgary. Registration can be completed by phoning 220-2877, by faxing or mailing the registration form in the back of Continuing Education January – August Winter 2008 Program Guide Book, or online at [www.ucalgary.ca/cted/registration.html](http://www.ucalgary.ca/cted/registration.html). (Use Course Finder and look under Business and Professional Programs, Professional Programs in Business, Exam Preparation). Room locations will be contained in the information package sent to registrants. All program registrants will be provided with a tuition tax receipt from the University of Calgary for the course registration fee.

### **FURTHER DETAILS**

If you, or someone else in your firm, require more detailed information please contact Dr. Michael Robinson of WFCL at 208-0677, or E-Mail him at [wfcl@telusplanet.net](mailto:wfcl@telusplanet.net).

### **SAMPLE COMMENTS ABOUT THE COURSE FROM PREVIOUS YEAR'S CLASS MEMBERS**

“Allowed for a pace to cover the material to be established. It formalized an otherwise total self-study course”

“Examples and insight really helped understanding”

“Tutorial sessions were very helpful”

“Upbeat instructors keep pace moving”

“The accounting section provided by Wayne Irvine was dead on the money on all points”

“Dr. Robinson was an excellent teacher who helped me understand the material better”

### **SEMINAR INSTRUCTORS**

Wayne Irvine, BComm, CA, CFA, is a member of the accounting area at the Haskayne School of Business at the University of Calgary. Prior to this appointment, he worked for twelve years at Price Waterhouse, and was also an instructor at Mount Royal College. Mr. Irvine has many years of experience teaching professional development courses and has taught in CFA<sup>®</sup> review seminars in Calgary, Toronto, Vancouver and Ottawa for fourteen years. He has also instructed preparatory classes for CMA students, CA students, and has served on education sub-committees for the Chartered Accountants of Alberta. Mr. Irvine was the recipient of the 2000 CA Award for Teaching Excellence and will be instructing the Financial Statement Analysis classes on March 17, March 24, and March 31.

Michael Robinson, BMath, MBA, PhD, CFA, ICD.D is a member of the finance area at the Haskayne School of Business of the University of Calgary and has taught economics, quantitative methods, corporate finance, security analysis and portfolio management to B. Comm, MBA, and Ph.D. students for over fifteen years. He received the Dean's Award for Teaching Excellence for 2005/2006. He has also taught at the University of Western Ontario, Wilfrid Laurier University, the Warsaw School of Economics, and the University of Petroleum, Beijing. Dr. Robinson has taught CFA<sup>®</sup> review seminars in Calgary, Toronto, Vancouver and Ottawa for the last fifteen years. Dr. Robinson will instruct all classes other than the ones taught by Mr. Irvine.

**SCHEDULE FOR THE 2008 CALGARY “LEVEL I CFA® REVIEW SEMINAR”  
OFFERED BY CONTINUING EDUCATION, THE UNIVERSITY OF CALGARY  
COURSE NUMBER: 95152**

<b>DATE</b>	<b>STUDY SESSIONS</b>	<b>TOPIC</b>
January 14	1	Ethical and Professional Standards
January 21	2,3	Quantitative Methods
January 28	2,3	Quantitative Methods
February 4	4,5,6	Economics
February 11	4,5,6	Economics
February 18	NONE	NO CLASS: ALBERTA FAMILY DAY
February 25	11	Corporate Finance
March 3	12,13	Portfolio Management / Equity Investments
March 10	13,14	Equity Investments
March 17	7,8,9,10	Financial Statement Analysis
March 24	7,8,9,10	Financial Statement Analysis
March 31	7,8,9,10	Financial Statement Analysis
April 7	15	Fixed Income Investments
April 14	15,16	Fixed Income Investments
April 21	17,18	Derivative Investments / Alternative Investments
April 26	ALL (9AM-4PM)	Mock Exam