

CFA[®]

PROGRAM

CHARTERED FINANCIAL ANALYST

LEADING GLOBAL PROVIDER

Over 24 years in offering all 3 levels of CFA[®] Program training in Hong Kong. Proven track record and experience over 50 class locations.

EXPERT TRAINERS

Satisfaction Rate of Trainer #: ≥90%

FLEXIBLE COURSE OPTIONS

FREE ONLINE ACCESS EXTENSION*

Max extend for 6 months with exam registration proof shown

CATCH-UP VIDEOS (Unlimited access)

Review or make up missed sessions anytime online

COMPREHENSIVE LEARNING APPROACH

CEF REIMBURSABLE COURSE



FOR MORE INFORMATION

kfmhk **facebook**

www.kaplan.com.hk/kfm

THE CFA® PROGRAM

CFA® Program
Chartered Financial Analyst

Kaplan Financial (HK) Limited 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

Final Year
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



48 Months

Relevant Work Experience
accumulated before, during or after the exam



2 Sponsor Statements
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 Financial. CFA Institute, CFA® and the Chartered Financial Analyst® are trademarks owned by CFA Institute.

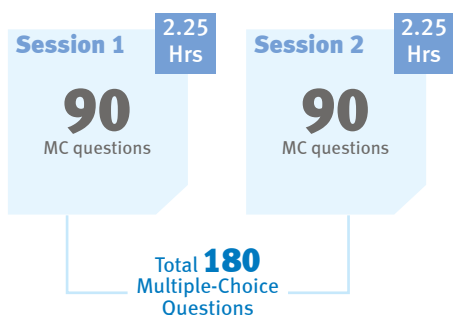
CFA Institute recommends minimum **300 hours** of study time for each level. Your time commitment is critical to success. Kaplan CFA® Exam Prep will **enhance your understanding of the materials** but your commitment to **out-of-classroom study** is essential.

EXAM STRUCTURE

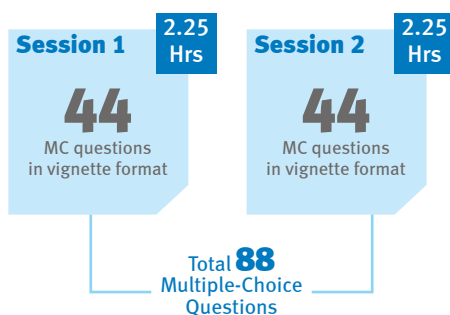


Computer-based

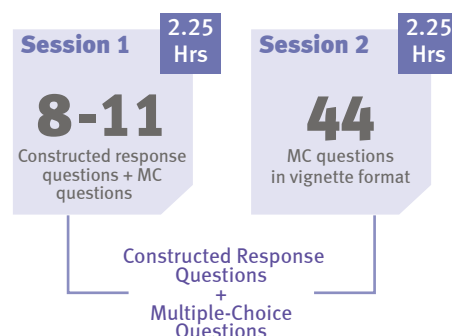
LEVEL I



LEVEL II



LEVEL III



Topic Area Weights

Exam Topic	LEVEL I	LEVEL II	LEVEL III
Ethical and Professional Standards	15-20%	10-15%	10-15%
Quantitative Methods	8-12%	5-10%	-
Economics	8-12%	5-10%	5-10%
Financial Reporting and Analysis	13-17%	10-15%	-
Corporate Finance	8-12%	5-10%	-
Equity Investments	10-12%	10-15%	10-15%
Fixed Income	10-12%	10-15%	15-20%
Derivatives	5-8%	5-10%	5-10%
Alternative Investments	5-8%	5-10%	5-10%
Portfolio Management and Wealth Planning	5-8%	10-15%	35-40%

CFA Exam Global Pass Rates

2019



2018



EXAM WINDOW IN 2021

	Fee	FEB	MAY	JUL	AUG	NOV
Early Registration	USD 700	16 Jun - 13 Aug 20	20 Aug - 3 Nov 20	19 Jan - 10 Mar 21	20 Aug 20 - 2 Feb 21	20 Aug 20 - 4 May 21
Standard Registration	USD 1,000	14 Aug - 28 Oct 20	4 Nov 20 - 23 Feb 21	11 Mar - 20 Apr 21	3 Feb 21 - 4 May 21	5 May 21 - 10 Aug 21
<i>Remark: One-time enrollment fee of USD 450 will be needed when you register for the Level I exam for the first time</i>						
Exam Window	Level I	16 Feb - 1 Mar 21	18 - 24 May 21	18 - 24 Jul 21	24 - 30 Aug 21	16 - 22 Nov 21
	Level II	-	25 May - 1 Jun 21	-	31 Aug - 4 Sep 21	26 Nov - 30 Nov 21
	Level III	-	25 May - 1 Jun 21	-	1 Sep - 8 Sep 21	23 - 25 Nov 21

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>



THE CFA® PROGRAM

COURSE STRUCTURE

CANTONESE

ENGLISH



4 - 6 Months
before exam

EDUCATION

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

18-20 Sessions

54-60
Hrs



1 - 2 Months
before exam

REVISION

Retain and remediate new knowledge through application and practice

9 Sessions

27
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

LEARNING RESOURCES

Education Program Slide Pack

Practice Questions

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

Free Schweser Essential Package

- FREE (Retail \$4,900)



Revision Mind Maps

- Summarize key concepts at a glance

Revision Q&A Book

- Over 800 exam-standard concept checkers

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

Online Progress Test

- 6 tests (Level I), 4 tests (Level II & III) scheduled at key milestones
- Extra questions to consolidate knowledge

Online Catch-up Video[^]

- If you are unable to attend a class, catch up by watching recorded lectures from home

Swap Class[^]

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

Online Catch-up Video[^]

- If you are unable to attend a class, catch up by watching recorded lectures from home

Swap Class[^] (2 sessions)

- Catch up missed lectures by swapping to another class

Online Education/Online Revision

- Captured from live Education Program & Revision Course
- Access the same quality teaching (trainer's audio, annotations and visuals) as students do in live lectures, except swap class service
- Tap into trainer support via email

[^]Terms and conditions apply.



2 - 4 Weeks
before exam

MOCK

Evaluate retention and application of new knowledge

Mock Exam

4.5
Hrs

Review

3
Hrs

Performance Measure

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

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)

LEVEL III IPS ESSAY WORKSHOP (12 HRS, RECOMMENDED)

The Level III exam can be the most intimidating for some candidates because of the constructed response (essay-type) questions. Unlike the other two levels, you will be asked to take the concepts in the curriculum and develop your own recommendations and solutions. This can be tough for a lot of candidates and will almost certainly test your ability to manage time during the test. In the IPS Essay Workshop, we will build up your confidence by **covering a set of typical IPS questions and demonstrating the methodology** that earn the maximum points.

You will learn how to :

- Read questions carefully
- Organize your work and plan before you write
- Write concise answers and give the graders an easy method to grade
- Use of phrases and follow-up sentences
- Use of answer templates

One IPS essay question will be critiqued and graded by the trainer, course materials include:

- IPS Course Slide Pack (with examples)
- IPS Question Book

LEVEL I & II TOPICAL ONLINE COURSE FINANCIAL REPORTING & ANALYSIS

Financial Reporting and Analysis is one of the unmissable topic areas to pass the exam – voluminous readings, heavily weighted in the exam, and can sometimes be weaved into other topic area questions. It is far more difficult than the introductory accounting courses in university. Non-accounting majors have spent disproportionate amount of time to grasp the concepts, let alone getting the right answers.

Available in short duration, this cost-effective online course means that you can learn FRA in the most efficient way possible, then get back to your normal study-flow for the rest of the topics. Don't get stuck in FRA and move on!

You will be able to access the on-demand Education Program videos and pdf Education Slides.

Unlimited Access



Prep at your own pace anytime anywhere

System Requirement

Visit goo.gl/CZd8ZP

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

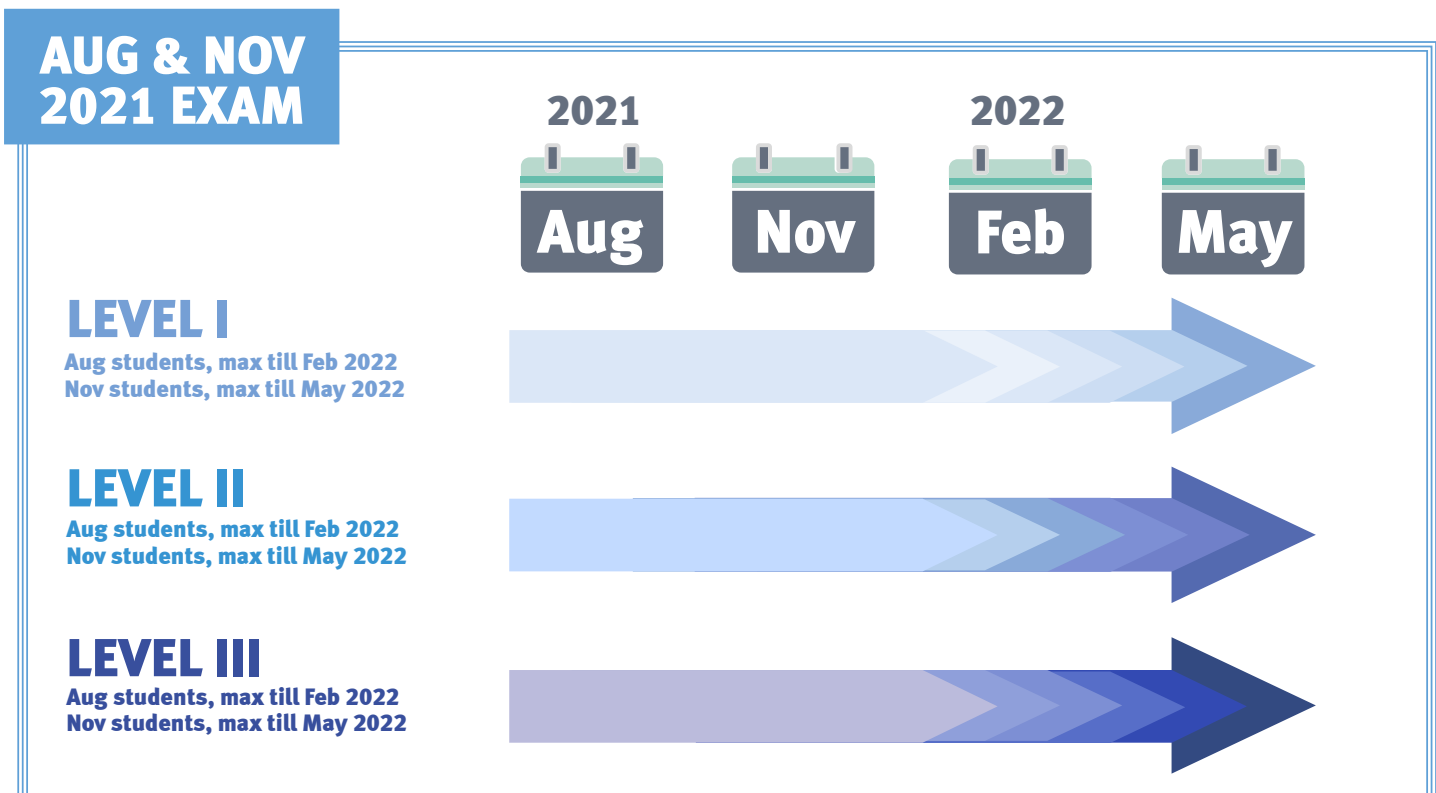
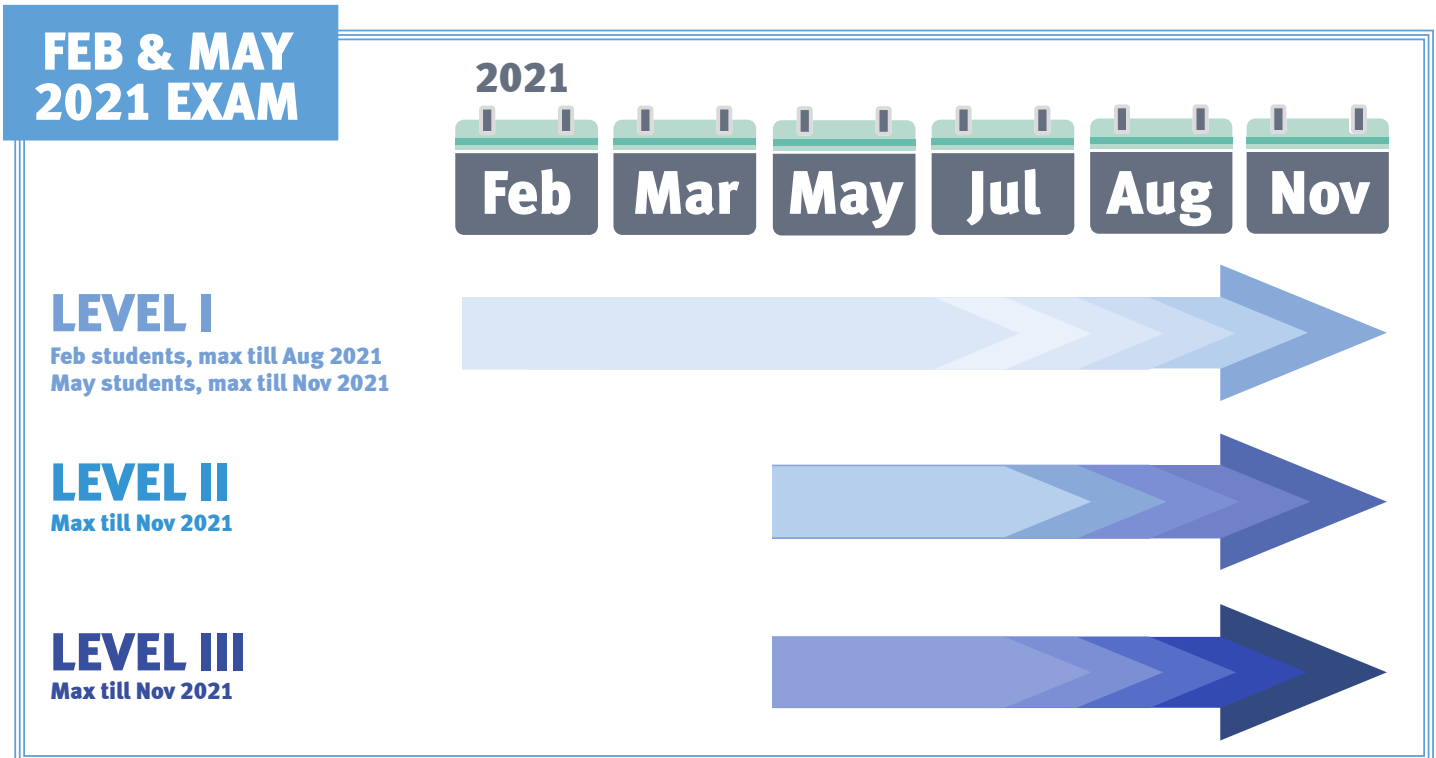
Contact us for assessment and price quote

Tel: 2526 3686 Email: hkca@kaplan.com

THE CFA® PROGRAM

FREE ONLINE ACCESS EXTENSION*

(same level, max extend for 6 months with registration proof shown)



* Refer to Kaplan HK's E-Learning Platform, not Schweser Portal.

- Online access will be extended to your new exam date as shown in the exam registration proof (max extend for 6 months) and referring to 2021 curriculum.
- Only applicable to Education and Revision phase, and only applicable to the program that you enrolled in.
- Alteration of trainer/language will **NOT** be allowed.
- New set of Schweser Essential Package will **NOT** be provided. You may purchase the updated Schweser materials at the applicable fees.
- New set of Kaplan class materials will **NOT** be provided.
- For Aug & Nov 2021 students who are extending the online access to Feb/May 2022:
 - » You may add \$4,900 to get the 2022 online access (only for enrolled program with the same language). 2022 Kaplan course slide pack (print) will be included.

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

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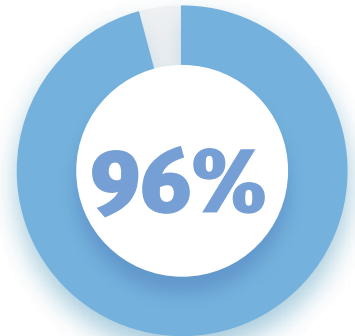
“

*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 - 2020 SURVEY RESULT)**

**HEAR WHAT OUR
STUDENTS SAY**



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

1

Online pre-course

Enroll Education Program/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 2020 exam season

2

FREE Schweser Essential Package*

For product availability, please refer to Appendix.
Remark: *Terms & conditions apply.

Enroll Education Program/Full Package and get your free set of 2021 Schweser Essential Package in advance

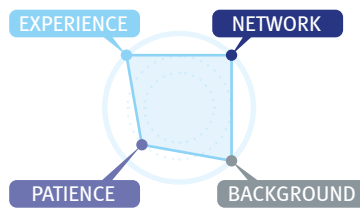


Trainers' Profile

Dr. Kyle Wong

PhD(Cornell), CFA, FRM

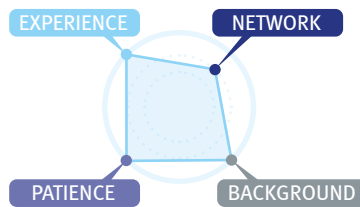
- Over 13 years of experience in teaching CFA Level I, II and III
- Design, develop and deliver financial training programs to top financial institutions and MNCs
- Expertise in investment tools, risk management, financial analysis, hedge fund, structured products, portfolio management and wealth management
- 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



Mr. Larry Yuen

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

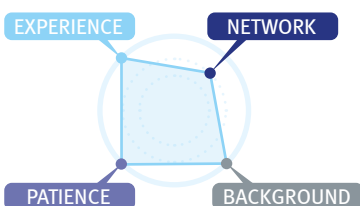
- All-round trainer with extensive experience in finance, risk management and accounting
- Over 20 years of experience in the financial industry spanning across wealth management and capital markets
- Held senior positions at Citi, Deutsche Bank, ABN Amro, ING and Schroder
- Expertise in portfolio management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



Mr. Jonathan Lau

BA Econ (Cambridge), CFA

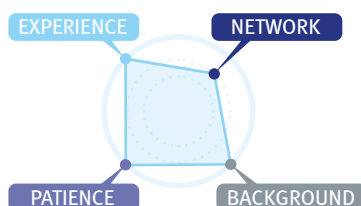
- Investment specialist with over 12 years of experience in multi-asset investments
- Was Head of Research for 7 years at Brooks Macdonald Asset Management based in London with over US\$13bn in assets under management
- Co-chaired the Asset Allocation Committee that oversaw the investment process, fund 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



Mr. J. Lam

MSc Financial Mathematics (HKUST), CFA

- Over 12 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

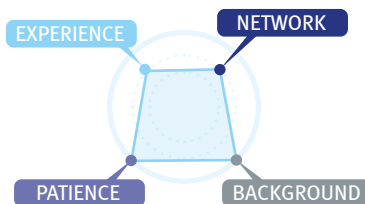


Mr. Chris Lam

BEcon&Fin (HKU)

LLB (Lond), CFA, FCCA, FRM

- Extensive experience in finance, banking, risk management and accounting
- Over 10 years of experience in top-tier banks covering various products and corporates
- Predominantly frontline experience in the career with superb communication skills
- Familiar with all major categories of investment and treasury products
- Expert in examination skills with a record of passing all papers of CFA, FCCA, and FRM in one attempt
- Numerous real-life application examples of academic theories



AVERAGE RATING OF TRAINERS#

#Jun 2017-2020 Statistics



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 Page 7.

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 Page 3.

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).

Online Catch-up Videos

Education Program and Revision Course 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 online access extension for you. Details please refer to Page 6.

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

23/F, Man Yee Building, 68 Des Voeux Road,
Central, Hong Kong
Tel: 2868 2700
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. The below terms and conditions DO NOT apply to individuals needing reimbursement from the Continuing Education Fund (CEF), who should refer to Enrollment Form CC01 and its overleaf for CEF-specific terms and conditions. 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.

Re-issuance of Official Receipt

20. An administration fee of \$50 will be charged for each re-issuance of official receipt.

Alteration of CEF Reimbursement Status Not Accepted

21. At the time of registration, students must make final decision on whether or not they will reimburse course fees from the Continuing Education Fund (CEF). Students are responsible for indicating this on the appropriate enrollment form. Kaplan Financial does not accept alteration of CEF status once enrollment is processed. Any alternative of the intention for applying CEF after submission of the enrollment form will induce ineligibility for their CEF claims.

Catch-Up Video (available for Classroom Learning – Education Program and Revision Course only)

22. Kaplan Financial does not warrant that the catch-up videos will be uninterrupted or error-free. All 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.
23. Attendance will not be counted for watching of a video for CPT or attendance purpose.
24. 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

25. 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.
26. 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.
27. 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

28. 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 exam date of your enrolled semester.

29. 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 (for Revision Course, login information will be emailed 7 working days prior to course commencement). 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

30. Class materials will be distributed on regular intervals – first on the first day of course and also during the progression of the course.
31. All class materials must be collected within the same course semester.
32. Students must bring stationery and the financial calculator (Texas Instruments BAI Plus or HP 12C) to class. If students have not used HP 12C before, Kaplan Financial recommends Texas Instrument BAI Plus. Students must bring all course notes collected to class. Kaplan Financial does not have spare copies to lend.

Housekeeping

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

Copyright Policy

34. 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.
35. Video or audio recording devices are prohibited under any circumstances.

eLearning

36. 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.
37. Course materials will be released in milestones. You are required to collect the course material including course slide pack and Schweser Essential Package (only if you have enrolled) 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). 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.
38. 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.
39. It is a limited license to use the content only between the times of access is granted and the exam date for the same semester. Kaplan bears no responsibility to extend the access period, regardless of students' actual exam date.
40. 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

41. Sales of all products are final, non-refundable and non-returnable once order is placed and payment received.
42. 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.
43. 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.
44. 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 of the last exam semester in 2021 (for level I); the 15th of the month after the exam of your enrolled semester (for Level II & III). Kaplan bears no responsibility to extend the access period, regardless of purchasers actual exam date.
45. 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.
46. 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.
47. 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

48. 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.
49. A course evaluation will be administered at the end of the course.

Ethics and Standards of Professional Conduct

50. 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.
51. 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

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

Personal Data Protection

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

Code of Conduct

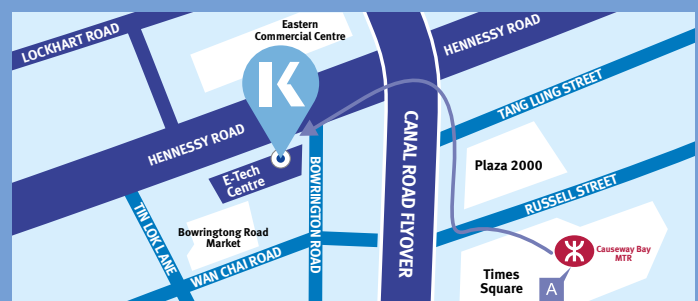
54. It is the responsibility of every student to be aware of the Kaplan Hong Kong Code of Conduct's content as published in <http://www.kaplan.com.hk/code-of-conduct> and to abide by its provisions.

Kaplan Financial (HK) Limited

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

Tel : 2526 3686
Fax : 2501 0589

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



LEVEL I - COURSE SCHEDULE (MAY 2021)

Appendix 1

EDUCATION PROGRAM

60 hours

20 sessions

PT = Online Progress Test Release Date	CLASSROOM									ONLINE		
	CLASS A			CLASS B			CLASS C			J. LAM CANTONESE	JONATHAN LAU ENGLISH	
	TRAINER ▶ J. LAM CANTONESE			JONATHAN LAU ENGLISH			CHRIS LAM CANTONESE					
DATE	DAY	TIME	DATE	DAY	TIME	DATE	DAY	TIME	DATE	DATE		
1	Quantitative Methods	10/01/21	Sun	10:00 - 13:00	02/02/21	Tue	19:00 - 22:00	14/01/21	Thu	19:15 - 22:15	19/01/21	11/02/21
2	Quantitative Methods	10/01/21	Sun	14:00 - 17:00	07/02/21	Sun	10:00 - 13:00	19/01/21	Tue	19:15 - 22:15	19/01/21	16/02/21
3	PT1 Quantitative Methods	17/01/21	Sun	10:00 - 13:00	07/02/21	Sun	14:00 - 17:00	21/01/21	Thu	19:15 - 22:15	26/01/21	16/02/21
4	Financial Reporting and Analysis	17/01/21	Sun	14:00 - 17:00	21/02/21	Sun	10:00 - 13:00	26/01/21	Tue	19:15 - 22:15	26/01/21	02/03/21
5	Financial Reporting and Analysis	24/01/21	Sun	10:00 - 13:00	21/02/21	Sun	14:00 - 17:00	28/01/21	Thu	19:15 - 22:15	02/02/21	02/03/21
6	Financial Reporting and Analysis	24/01/21	Sun	14:00 - 17:00	23/02/21	Tue	19:00 - 22:00	02/02/21	Tue	19:15 - 22:15	02/02/21	04/03/21
7	Financial Reporting and Analysis	31/01/21	Sun	10:00 - 13:00	28/02/21	Sun	10:00 - 13:00	04/02/21	Thu	19:15 - 22:15	09/02/21	09/03/21
8	PT2 Financial Reporting and Analysis	31/01/21	Sun	14:00 - 17:00	28/02/21	Sun	14:00 - 17:00	09/02/21	Tue	19:15 - 22:15	09/02/21	09/03/21
9	Portfolio Management	07/02/21	Sun	10:00 - 13:00	07/03/21	Sun	10:00 - 13:00	18/02/21	Thu	19:15 - 22:15	16/02/21	16/03/21
10	Portfolio Management + Corporate Finance	07/02/21	Sun	14:00 - 17:00	07/03/21	Sun	14:00 - 17:00	23/02/21	Tue	19:15 - 22:15	16/02/21	16/03/21
11	Corporate Finance	21/02/21	Sun	10:00 - 13:00	09/03/21	Tue	19:00 - 22:00	25/02/21	Thu	19:15 - 22:15	02/03/21	18/03/21
12	Equity	21/02/21	Sun	14:00 - 17:00	14/03/21	Sun	10:00 - 13:00	02/03/21	Tue	19:15 - 22:15	02/03/21	23/03/21
13	PT3 Equity	28/02/21	Sun	10:00 - 13:00	14/03/21	Sun	14:00 - 17:00	04/03/21	Thu	19:15 - 22:15	09/03/21	23/03/21
14	Fixed Income	28/02/21	Sun	14:00 - 17:00	21/03/21	Sun	10:00 - 13:00	09/03/21	Tue	19:15 - 22:15	09/03/21	30/03/21
15	Fixed Income	07/03/21	Sun	10:00 - 13:00	21/03/21	Sun	14:00 - 17:00	11/03/21	Thu	19:15 - 22:15	16/03/21	30/03/21
16	Derivatives	07/03/21	Sun	14:00 - 17:00	23/03/21	Tue	19:00 - 22:00	16/03/21	Tue	19:15 - 22:15	16/03/21	01/04/21
17	PT4 Derivatives + Alternative Investments	14/03/21	Sun	10:00 - 13:00	28/03/21	Sun	10:00 - 13:00	18/03/21	Thu	19:15 - 22:15	23/03/21	06/04/21
18	Economics	14/03/21	Sun	14:00 - 17:00	28/03/21	Sun	14:00 - 17:00	23/03/21	Tue	19:15 - 22:15	23/03/21	06/04/21
19	PT5 Economics	21/03/21	Sun	10:00 - 13:00	04/04/21	Sun	10:00 - 13:00	25/03/21	Thu	19:15 - 22:15	30/03/21	13/04/21
20	PT6 Ethical and Professional Standards	21/03/21	Sun	14:00 - 17:00	04/04/21	Sun	14:00 - 17:00	30/03/21	Tue	19:15 - 22:15	30/03/21	13/04/21

REVISION COURSE

27 hours

9 sessions

TRAINER ▶	CLASSROOM						ONLINE		
	CLASS A			CLASS B			J. LAM CANTONESE	JONATHAN LAU ENGLISH	
	J. LAM CANTONESE			JONATHAN LAU ENGLISH					
DATE	DAY	TIME	DATE	DAY	TIME	DATE	DATE		
1	Quantitative Methods	01/04/21	Thu	19:00 - 22:00	07/04/21	Wed	19:00 - 22:00	10/04/21	16/04/21
2	Financial Reporting and Analysis	04/04/21	Sun	10:00 - 13:00	11/04/21	Sun	10:00 - 13:00	13/04/21	20/04/21
3	Financial Reporting and Analysis	04/04/21	Sun	14:00 - 17:00	11/04/21	Sun	14:00 - 17:00	13/04/21	20/04/21
4	Portfolio Management + Corporate Finance	11/04/21	Sun	10:00 - 13:00	18/04/21	Sun	10:00 - 13:00	20/04/21	27/04/21
5	Corporate Finance + Equity	11/04/21	Sun	14:00 - 17:00	18/04/21	Sun	14:00 - 17:00	20/04/21	27/04/21
6	Equity	18/04/21	Sun	10:00 - 13:00	25/04/21	Sun	10:00 - 13:00	27/04/21	04/05/21
7	Fixed Income	18/04/21	Sun	14:00 - 17:00	25/04/21	Sun	14:00 - 17:00	27/04/21	04/05/21
8	Derivatives Investments + Alternative Investments	25/04/21	Sun	10:00 - 13:00	02/05/21	Sun	10:00 - 13:00	04/05/21	06/05/21
9	Economics + Ethical and Professional Standards	25/04/21	Sun	14:00 - 17:00	02/05/21	Sun	14:00 - 17:00	04/05/21	06/05/21

ONLINE MOCK 4.5 hours

DATE	DAY	TIME
08/05/21	Sat	10:00 - 12:15 & 12:45 - 15:00

MOCK EXAM REVIEW

3 hours

CLASS A CANTONESE TRAINER: J. LAM				CLASS B ENGLISH TRAINER: JONATHAN LAU			
FORMAT	DATE	DAY	TIME	FORMAT	DATE	DAY	TIME
Classroom	11/05/21	Tue	19:00 - 22:00	Classroom	12/05/21	Wed	19:00 - 22:00
Online	Same timeslot as above in Live Online Format			Online	Same timeslot as above in Live Online Format		

CLASSROOM LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Classroom Full Package	ENROLLED BY 16/01/21	
Education + Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$12,750	\$15,000
Classroom Education Program Only	ENROLLED BY 16/01/21	
Education + Schweser Essential Package (Print & Online)	\$10,240	\$12,800
Classroom Revision Course Only	ENROLLED BY 07/04/21	
	\$5,300	\$6,300
Online Mock & Classroom Review Only		\$1,300

CEF applicants and holders, please refer to Enrollment Form CC01 and its overleaf for prices and specified terms and conditions.

ONLINE LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Blended Full Package	ENROLLED BY 16/01/21	
Online Education + Classroom Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$12,750	\$15,000
Online Full Package	ENROLLED BY 16/01/21	
Online Education + Online Revision + Online Mock and Online Review + Schweser Essential Package (Print & Online)	\$12,750	\$15,000
Online Education Program Only	ENROLLED BY 16/01/21	
Online Education + Schweser Essential Package (Print & Online)	\$10,240	\$12,800
Online Revision Course Only	ENROLLED BY 07/04/21	
	\$5,300	\$6,300
Online Mock & Online Review Only		\$1,300

Add on item (For both Classroom & Online Learning): Online Schweser Mock Exam \$600 (original \$800)

Interest-free Installments

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

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

Please enroll in person. Not eligible if you need CEF reimbursement.

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.



持續進修基金
Continuing Education Fund

Continuing Education Fund

Institute Code : 519

Course Title : Kaplan Financial (HK) Limited

The following courses have been included in the list of reimbursable courses for CEF purpose.

CFA LEVEL 1 EDUCATION PROGRAMME [23Z02088-4]
- Equivalent to Classroom Learning of Education Program

CFA LEVEL 1 REVISION COURSE AND PRACTICE EXAM [23Z01762-A]
- Equivalent to combination of Classroom Learning of Revision Course plus Mock Exam & Review

Upon "successful completion" of the course, Kaplan Financial will issue you a "Proof of Completion of Course" before 30/06/21. "Successful completion" of the course means that you have attended no less than 70% of the course AND you have attained the passing mark of 50% in the assessment.

Important: Please use Enrollment Form CC01 to enroll. You should read and understand the 'Terms and Guidance Notes for Course Registration' overleaf before submitting the form. Other courses, services, and Schweser products are NOT CEF reimbursable.

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

1

Online pre-course

Enroll Education Program/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

2

FREE Schweser Essential Package*

For product availability, please refer to Appendix 10.

Remark: *Terms & conditions apply.

Enroll Education Program/Full Package and get your free set of 2021 Schweser Essential Package in advance



Kaplan Financial (HK) Limited

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

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www.kaplan.com.hk/kfm

LEVEL II - COURSE SCHEDULE (MAY 2021)

Appendix 2

EDUCATION PROGRAM

54 hours

18 sessions

PT = Online Progress Test Release Date	CLASSROOM						ONLINE	
	CLASS A			CLASS B			KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
	KYLE WONG CANTONESE			JONATHAN LAU ENGLISH				
TRAINER ▶	DATE	DAY	TIME	DATE	DAY	TIME	DATE	DATE
1	Class A1 or Class A2			Class B1 or Class B2			22/01/21	01/02/21
2	Class A1 or Class A2			Class B1 or Class B2			29/01/21	01/02/21
3 PT1	Class A1 or Class A2			Class B1 or Class B2			05/02/21	08/02/21
4	Class A1 or Class A2			Class B1 or Class B2			12/02/21	08/02/21
5	28/02/21	Sun	14:00 - 17:00	02/03/21	Tue	19:00 - 22:00	09/03/21	11/03/21
6	03/03/21	Wed	19:00 - 22:00	06/03/21	Sat	10:00 - 13:00	12/03/21	15/03/21
7	07/03/21	Sun	10:00 - 13:00	06/03/21	Sat	14:00 - 17:00	16/03/21	15/03/21
8	07/03/21	Sun	14:00 - 17:00	13/03/21	Sat	10:00 - 13:00	16/03/21	22/03/21
9 PT2	14/03/21	Sun	10:00 - 13:00	13/03/21	Sat	14:00 - 17:00	23/03/21	22/03/21
10	14/03/21	Sun	14:00 - 17:00	16/03/21	Tue	19:00 - 22:00	23/03/21	25/03/21
11	17/03/21	Wed	19:00 - 22:00	20/03/21	Sat	10:00 - 13:00	26/03/21	29/03/21
12	21/03/21	Sun	10:00 - 13:00	20/03/21	Sat	14:00 - 17:00	30/03/21	29/03/21
13	21/03/21	Sun	14:00 - 17:00	27/03/21	Sat	10:00 - 13:00	30/03/21	05/04/21
14 PT3	28/03/21	Sun	10:00 - 13:00	27/03/21	Sat	14:00 - 17:00	06/04/21	05/04/21
15	28/03/21	Sun	14:00 - 17:00	30/03/21	Tue	19:00 - 22:00	06/04/21	08/04/21
16	31/03/21	Wed	19:00 - 22:00	03/04/21	Sat	10:00 - 13:00	09/04/21	12/04/21
17	05/04/21	Mon	10:00 - 13:00	03/04/21	Sat	14:00 - 17:00	14/04/21	12/04/21
18 PT4	05/04/21	Mon	14:00 - 17:00	06/04/21	Tue	14:00 - 17:00	14/04/21	15/04/21

Please select one of these options

CLASS A1			CLASS A2		
DATE	DAY	TIME	DATE	DAY	TIME
13/01/21	Wed	19:00 - 22:00	17/02/21	Wed	19:00 - 22:00
20/01/21	Wed	19:00 - 22:00	21/02/21	Sun	10:00 - 13:00
27/01/21	Wed	19:00 - 22:00	21/02/21	Sun	14:00 - 17:00
03/02/21	Wed	19:00 - 22:00	28/02/21	Sun	10:00 - 13:00

Please select one of these options

CLASS B1			CLASS B2		
DATE	DAY	TIME	DATE	DAY	TIME
23/01/21	Sat	10:00 - 13:00	20/02/21	Sat	10:00 - 13:00
23/01/21	Sat	14:00 - 17:00	20/02/21	Sat	14:00 - 17:00
30/01/21	Sat	10:00 - 13:00	27/02/21	Sat	10:00 - 13:00
30/01/21	Sat	14:00 - 17:00	27/02/21	Sat	14:00 - 17:00

REVISION COURSE

27 hours

9 sessions

TRAINER ▶	CLASSROOM						ONLINE	
	CLASS A			CLASS B			KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
	KYLE WONG CANTONESE			JONATHAN LAU ENGLISH				
	DATE	DAY	TIME	DATE	DAY	TIME	DATE	DATE
1	14/04/21	Wed	19:00 - 22:00	13/04/21	Tue	19:00 - 22:00	23/04/21	20/04/21
2	18/04/21	Sun	10:00 - 13:00	17/04/21	Sat	10:00 - 13:00	27/04/21	24/04/21
3	18/04/21	Sun	14:00 - 17:00	17/04/21	Sat	14:00 - 17:00	27/04/21	24/04/21
4	25/04/21	Sun	10:00 - 13:00	24/04/21	Sat	10:00 - 13:00	04/05/21	01/05/21
5	25/04/21	Sun	14:00 - 17:00	24/04/21	Sat	14:00 - 17:00	04/05/21	01/05/21
6	02/05/21	Sun	10:00 - 13:00	01/05/21	Sat	10:00 - 13:00	11/05/21	08/05/21
7	02/05/21	Sun	14:00 - 17:00	01/05/21	Sat	14:00 - 17:00	11/05/21	08/05/21
8	09/05/21	Sun	10:00 - 13:00	08/05/20	Sat	10:00 - 13:00	13/05/21	12/05/21
9	09/05/21	Sun	14:00 - 17:00	08/05/20	Sat	14:00 - 17:00	13/05/21	12/05/21

ONLINE MOCK 4.5 hours

DATE	DAY	TIME
15/05/21	Sat	10:00 - 12:15 & 12:45 - 15:00

MOCK EXAM REVIEW

3 hours

CLASS A CANTONESE				TRAINER: KYLE WONG				CLASS B ENGLISH				TRAINER: JONATHAN LAU			
FORMAT	DATE	DAY	TIME	FORMAT	DATE	DAY	TIME	FORMAT	DATE	DAY	TIME	FORMAT	DATE	DAY	TIME
Classroom	18/05/21	Tue	19:00 - 22:00	Classroom	20/05/21	Thu	19:00 - 22:00	Classroom	20/05/21	Thu	19:00 - 22:00	Classroom	20/05/21	Thu	19:00 - 22:00
Online	Same timeslot as above in Live Online Format			Online	Same timeslot as above in Live Online Format			Online	Same timeslot as above in Live Online Format			Online	Same timeslot as above in Live Online Format		

CLASSROOM LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Classroom Full Package	ENROLLED BY 10/02/21	
Education + Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$17,500	\$20,000
Classroom Education Program Only	ENROLLED BY 10/02/21	
Education + Schweser Essential Package (Print & Online)	\$12,900	\$15,000
Classroom Revision Course Only	ENROLLED BY 07/04/21	
	\$7,380	\$9,000
Online Mock & Classroom Review Only		\$1,400

CEF applicants and holders, please refer to Enrollment Form CC01 and its overleaf for prices and specified terms and conditions.

Interest-free Installments

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

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

Please enroll in person. Not eligible if you need CEF reimbursement.

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.

ONLINE LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Blended Full Package	ENROLLED BY 10/02/21	
Online Education + Classroom Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$17,500	\$20,000
Online Full Package	ENROLLED BY 10/02/21	
Online Education + Online Revision + Online Mock and Online Review + Schweser Essential Package (Print & Online)	\$17,500	\$20,000
Online Education Program Only	ENROLLED BY 10/02/21	
Online Education + Schweser Essential Package (Print & Online)	\$12,900	\$15,000
Online Revision Course Only	ENROLLED BY 07/04/21	
	\$7,380	\$9,000
Online Mock & Online Review Only		\$1,400



Continuing Education Fund

Institute Code : 519

Course Title : Kaplan Financial (HK) Limited

The following courses have been included in the list of reimbursable courses for CEF purpose.

CFA LEVEL 2 EDUCATION PROGRAMME [23Z02089-2]
- Equivalent to Classroom Learning of Education Program

CFA LEVEL 2 REVISION COURSE AND PRACTICE EXAM [23Z01818-9]
- Equivalent to combination of Classroom Learning of Revision Course plus Mock Exam & Review

Upon "successful completion" of the course, Kaplan Financial will issue you a "Proof of Completion of Course" before 30/06/21. "Successful completion" of the course means that you have attended no less than 70% of the course AND you have attained the passing mark of 50% in the assessment.

Important: Please use Enrollment Form CC01 to enroll. You should read and understand the "Terms and Guidance Notes for Course Registration" overleaf before submitting the form. Other courses, services, and Schweser products are NOT CEF reimbursable.

Add on item (For both Classroom & Online Learning): Online Schweser Mock Exam \$600 (original \$800)

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

- 1 Online pre-course**
Enroll Education Program/Full Package by early bird deadline for our exclusive online pre-course features:

Level II:
9 hours of instruction extracted from 2020 exam season

- 2 FREE Schweser Essential Package***
For product availability, please refer to Appendix 11.
Remark: *Terms & conditions apply.

Enroll Education Program/Full Package and get your free set of 2021 Schweser Essential Package in advance



Kaplan Financial (HK) Limited

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LEVEL III - COURSE SCHEDULE (MAY 2021)

Appendix 3

EDUCATION PROGRAM

54-57 hours

19 sessions

PT = Online Progress Test Release Date	CLASSROOM				ONLINE	PT = Online Progress Test	ONLINE			
	TRAINER ▶	CLASS A			KYLE WONG CANTONESE		TRAINER ▶	LARRY YUEN ENGLISH		
DATE		DAY	TIME	DATE		DATE				
1	Ethical and Professional Standards + GIPS	20/02/21	Sat	10:00 - 13:00	01/03/21	1	Ethical and Professional Standards + GIPS			
2	Behavioral Finance	20/02/21	Sat	14:00 - 17:00	01/03/21	2	Behavioral Finance			
3	Capital Market Expectations	27/02/21	Sat	10:00 - 13:00	08/03/21	3	Capital Market Expectations			
4	PT1 Capital Market Expectations	27/02/21	Sat	14:00 - 17:00	08/03/21	4	Capital Market Expectations			
5	Asset Allocation	02/03/21	Tue	19:00 - 22:00	11/03/21	5	PT1 Asset Allocation			
6	Derivatives	06/03/21	Sat	10:00 - 13:00	15/03/21	6	Derivatives			
7	Currency Management	06/03/21	Sat	14:00 - 17:00	15/03/21	7	Currency Management			
8	Fixed Income	09/03/21	Tue	19:00 - 22:00	18/03/21	8	Fixed Income			
9	PT2 Fixed Income	13/03/21	Sat	10:00 - 13:00	22/03/21	9	Fixed Income			
10	Equity	13/03/21	Sat	14:00 - 17:00	22/03/21	10	Equity			
11	Equity + Alternative Investments	16/03/21	Tue	19:00 - 22:00	25/03/21	11	Alternative Investments			
12	Alternative Investments	20/03/21	Sat	10:00 - 13:00	29/03/21	12	PT2 Alternative Investments			
13	Private Wealth Management	20/03/21	Sat	14:00 - 17:00	29/03/21	13	Private Wealth Management			
14	Private Wealth Management	23/03/21	Tue	19:00 - 22:00	01/04/21	14	Private Wealth Management			
15	PT3 Private Wealth Management	27/03/21	Sat	10:00 - 13:00	05/04/21	15	Private Wealth Management			
16	Institutional Investors	27/03/21	Sat	14:00 - 17:00	05/04/21	16	PT3 Institutional Investors and Trading			
17	Trading	30/03/21	Tue	19:00 - 22:00	08/04/21	17	Portfolio Performance Evaluation			
18	Portfolio Performance Evaluation	03/04/21	Sat	10:00 - 13:00	12/04/21	18	PT4 Investment Manager Selection and Case Studies			
19	PT4 Investment Manager Selection and Case Studies	03/04/21	Sat	14:00 - 17:00	12/04/21					

All videos available now (videos captured from 2020 classroom education program)

REVISION COURSE

27 hours

9 sessions

TRAINER ▶	CLASSROOM				ONLINE	
	CLASS A			KYLE WONG CANTONESE	LARRY YUEN ENGLISH	
DATE	DAY	TIME	DATE		DATE	
1	Ethics and Behavioral Finance	07/04/21	Wed	19:00 - 22:00	15/04/21	
2	GIPS and Capital Market Expectation	10/04/21	Sat	10:00 - 13:00	19/04/21	
3	Asset Allocation	10/04/21	Sat	14:00 - 17:00	19/04/21	
4	Derivatives and Currency Management	17/04/21	Sat	10:00 - 13:00	26/04/21	
5	Fixed Income	17/04/21	Sat	14:00 - 17:00	26/04/21	
6	Equity + Alternative Investments	20/04/21	Tue	19:00 - 22:00	29/04/21	
7	Private Wealth Management	24/04/21	Sat	10:00 - 13:00	03/05/21	
8	Private Wealth Management + Institutional Investors	24/04/21	Sat	14:00 - 17:00	03/05/21	
9	Portfolio Performance Evaluation + Investment Manager Selection	27/04/21	Tue	19:00 - 22:00	06/05/21	

All videos available now (videos captured from 2020 classroom revision course)

ONLINE MOCK

4.5 hours

DATE	DAY	TIME
08/05/21	Sat	10:00 - 12:15 & 12:45 - 15:00

MOCK EXAM REVIEW

3 hours

CLASS A CANTONESE				TRAINER: KYLE WONG	CLASS B ENGLISH				TRAINER: LARRY YUEN
FORMAT	DATE	DAY	TIME	FORMAT	DATE	DAY	TIME		
Classroom	19/05/21	Wed	14:00 - 17:00	Classroom	20/05/21	Thu	19:00 - 22:00		
Online	Same timeslot as above in Live Online Format			Online	Same timeslot as above in Live Online Format				

IPS ESSAY WORKSHOP (RECOMMENDED)

12 hours

4 sessions

TRAINER ▶	CLASSROOM			
	CLASS A			
DATE	DAY	TIME	KYLE WONG CANTONESE	
			1	Overview: IPS Components, Portfolio Management and Wealth and Planning
2	IPS Strategies, Technique Demonstration	25/03/21	Thu	19:00 - 22:00
3	Essay Practice and Debriefing, Submit Assignment	08/04/21	Thu	19:00 - 22:00
4	Final Debriefing and Tips	22/04/21	Thu	19:00 - 22:00

CLASSROOM LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Classroom Full Package	ENROLLED BY 10/02/21	
Education + Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$18,720	\$20,800
Classroom Education Program Only	ENROLLED BY 10/02/21	
Education + Schweser Essential Package (Print & Online)	\$14,365	\$16,900
Classroom Revision Course Only	ENROLLED BY 07/04/21	
	\$8,400	\$10,500
Online Mock & Classroom Review Only		\$1,500
Classroom IPS Essay Workshop	ENROLLED BY 27/02/21	
	\$6,640	\$8,300

CEF applicants and holders, please refer to Enrollment Form CC01 and its overleaf for prices and specified terms and conditions.

ONLINE LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Blended Full Package	ENROLLED BY 10/02/21	
Online Education + Classroom Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$18,720	\$20,800
Online Full Package	ENROLLED BY 10/02/21	
Online Education + Online Revision + Online Mock and Online Review + Schweser Essential Package (Print & Online)	\$18,720	\$20,800
Online Education Program Only	ENROLLED BY 10/02/21	
Online Education + Schweser Essential Package (Print & Online)	\$14,365	\$16,900
Online Revision Course Only	ENROLLED BY 07/04/21	
	\$8,400	\$10,500
Online Mock & Online Review Only		\$1,500

Add on item (For both Classroom & Online Learning): Online Schweser Mock Exam \$600 (original \$800)

Interest-free Installments

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

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

Please enroll in person. Not eligible if you need CEF reimbursement.

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.



Continuing Education Fund

Institute Code : 519

Course Title : Kaplan Financial (HK) Limited

The following courses have been included in the list of reimbursable courses for CEF purpose.

CFA LEVEL 3 EDUCATION PROGRAMME [23Z02090-6]
- Equivalent to Classroom Learning of Education Program

CFA LEVEL 3 REVISION COURSE AND PRACTICE EXAM [23Z01819-7]
- Equivalent to combination of Classroom Learning of Revision Course plus Mock Exam & Review

Upon "successful completion" of the course, Kaplan Financial will issue you a "Proof of Completion of Course" before 30/06/21. "Successful completion" of the course means that you have attended no less than 70% of the course AND you have attained the passing mark of 50% in the assessment.

Important: Please use Enrollment Form CC01 to enroll. You should read and understand the "Terms and Guidance Notes for Course Registration" overleaf before submitting the form. Other courses, services, and Schweser products are NOT CEF reimbursable.

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

1

Online pre-course

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

Level III:

9 hours of instruction extracted from 2020 exam season

2

FREE Schweser Essential Package*

For product availability, please refer to Appendix 11.

Remark: *Terms & conditions apply.

Enroll Education Program/Full Package and get your free set of 2021 Schweser Essential Package in advance



Kaplan Financial (HK) Limited

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

Tel : 2526 3686
Fax : 2501 0589

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

LEVEL I - COURSE SCHEDULE (AUG 2021)

Appendix 4

EDUCATION PROGRAM

60 hours

20 sessions

PT = Online Progress Test Release Date		CLASSROOM						ONLINE	
		CLASS A			CLASS B			J. LAM CANTONESE	JONATHAN LAU ENGLISH
TRAINER ▶		LARRY YUEN CANTONESE			JONATHAN LAU ENGLISH				
		DATE	DAY	TIME	DATE	DAY	TIME	DATE	DATE
1	Quantitative Methods	10/04/21	Sat	10:00 - 13:00	04/05/21	Tue	19:00 - 22:00	Videos will be released by phases from late Jan to late Mar	Videos will be released by phases from mid-Feb to mid-Apr
2	Quantitative Methods	10/04/21	Sat	14:00 - 17:00	09/05/21	Sun	10:00 - 13:00		
3	PT1 Quantitative Methods	17/04/21	Sat	10:00 - 13:00	09/05/21	Sun	14:00 - 17:00		
4	Financial Reporting and Analysis	17/04/21	Sat	14:00 - 17:00	11/05/21	Tue	19:00 - 22:00		
5	Financial Reporting and Analysis	24/04/21	Sat	10:00 - 13:00	16/05/21	Sun	10:00 - 13:00		
6	Financial Reporting and Analysis	24/04/21	Sat	14:00 - 17:00	16/05/21	Sun	14:00 - 17:00		
7	Financial Reporting and Analysis	08/05/21	Sat	10:00 - 13:00	23/05/21	Sun	10:00 - 13:00		
8	PT2 Financial Reporting and Analysis	08/05/21	Sat	14:00 - 17:00	23/05/21	Sun	14:00 - 17:00		
9	Portfolio Management	15/05/21	Sat	10:00 - 13:00	30/05/21	Sun	10:00 - 13:00		
10	Portfolio Management + Corporate Finance	15/05/21	Sat	14:00 - 17:00	30/05/21	Sun	14:00 - 17:00		
11	Corporate Finance	22/05/21	Sat	10:00 - 13:00	01/06/21	Tue	19:00 - 22:00		
12	Equity	22/05/21	Sat	14:00 - 17:00	06/06/21	Sun	10:00 - 13:00		
13	PT3 Equity	29/05/21	Sat	10:00 - 13:00	06/06/21	Sun	14:00 - 17:00		
14	Fixed Income	29/05/21	Sat	14:00 - 17:00	13/06/21	Sun	10:00 - 13:00		
15	Fixed Income	05/06/21	Sat	10:00 - 13:00	13/06/21	Sun	14:00 - 17:00		
16	Derivatives	05/06/21	Sat	14:00 - 17:00	15/06/21	Tue	19:00 - 22:00		
17	PT4 Derivatives + Alternative Investments	12/06/21	Sat	10:00 - 13:00	20/06/21	Sun	10:00 - 13:00		
18	Economics	12/06/21	Sat	14:00 - 17:00	20/06/21	Sun	14:00 - 17:00		
19	PT5 Economics	19/06/21	Sat	10:00 - 13:00	27/06/21	Sun	10:00 - 13:00		
20	PT6 Ethical and Professional Standards	19/06/21	Sat	14:00 - 17:00	27/06/21	Sun	14:00 - 17:00		

REVISION COURSE

27 hours

9 sessions

TRAINER ▶		CLASSROOM						ONLINE	
		CLASS A			CLASS B			J. LAM CANTONESE	JONATHAN LAU ENGLISH
		LARRY YUEN CANTONESE			JONATHAN LAU ENGLISH				
		DATE	DAY	TIME	DATE	DAY	TIME	DATE	DATE
1	Quantitative Methods	29/06/21	Tue	19:00 - 22:00	18/07/21	Sun	10:00 - 13:00	Videos will be released by phases from mid-Apr to mid-May	Videos will be released by phases from mid-Apr to mid-May
2	Financial Reporting and Analysis	03/07/21	Sat	10:00 - 13:00	18/07/21	Sun	14:00 - 17:00		
3	Financial Reporting and Analysis	03/07/21	Sat	14:00 - 17:00	20/07/21	Tue	19:00 - 22:00		
4	Portfolio Management + Corporate Finance	10/07/21	Sat	10:00 - 13:00	25/07/21	Sun	10:00 - 13:00		
5	Corporate Finance + Equity	10/07/21	Sat	14:00 - 17:00	25/07/21	Sun	14:00 - 17:00		
6	Equity	17/07/21	Sat	10:00 - 13:00	01/08/21	Sun	10:00 - 13:00		
7	Fixed Income	17/07/21	Sat	14:00 - 17:00	01/08/21	Sun	14:00 - 17:00		
8	Derivatives Investments + Alternative Investments	24/07/21	Sat	10:00 - 13:00	08/08/21	Sun	10:00 - 13:00		
9	Economics + Ethical and Professional Standards	24/07/21	Sat	14:00 - 17:00	08/08/21	Sun	14:00 - 17:00		

ONLINE MOCK 4.5 hours

DATE	DAY	TIME
14/08/21	Sat	10:00 - 12:15 & 12:45 - 15:00

MOCK EXAM REVIEW

3 hours

CLASS A CANTONESE TRAINER: LARRY YUEN				CLASS B ENGLISH TRAINER: JONATHAN LAU			
FORMAT	DATE	DAY	TIME	FORMAT	DATE	DAY	TIME
Classroom	18/08/21	Wed	19:00 - 22:00	Classroom	19/08/21	Thu	19:00 - 22:00
Online	Same timeslot as above in Live Online Format			Online	Same timeslot as above in Live Online Format		

CLASSROOM LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Classroom Full Package	ENROLLED BY 24/04/21	
Education + Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$12,750	\$15,000
Classroom Education Program Only	ENROLLED BY 24/04/21	
Education + Schweser Essential Package (Print & Online)	\$10,240	\$12,800
Classroom Revision Course Only	ENROLLED BY 10/07/21	
	\$5,300	\$6,300
Online Mock & Classroom Review Only	\$1,300	

CEF applicants and holders, please refer to Enrollment Form CC01 and its overleaf for prices and specified terms and conditions.

Interest-free Installments

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

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

Please enroll in person. Not eligible if you need CEF reimbursement.

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.

ONLINE LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Blended Full Package	ENROLLED BY 24/04/21	
Online Education + Classroom Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$12,750	\$15,000
Online Full Package	ENROLLED BY 24/04/21	
Online Education + Online Revision + Online Mock and Online Review + Schweser Essential Package (Print & Online)	\$12,750	\$15,000
Online Education Program Only	ENROLLED BY 24/04/21	
Online Education + Schweser Essential Package (Print & Online)	\$10,240	\$12,800
Online Revision Course Only	ENROLLED BY 10/07/21	
	\$5,300	\$6,300
Online Mock & Online Review Only	\$1,300	

Add on item (For both Classroom & Online Learning): Online Schweser Mock Exam \$600 (original \$800)

TOPICAL ONLINE COURSE	PRICE
Financial Reporting and Analysis	\$3,900
Around 15 hours of videos extracted, from Education Program, choice of Cantonese or English. All videos will be available after late Mar 2021 and pdf slide deck included.	



持續進修基金
Continuing Education Fund

Continuing Education Fund

Institute Code : 519

Course Title : Kaplan Financial (HK) Limited

The following courses have been included in the list of reimbursable courses for CEF purpose.

CFA LEVEL 1 EDUCATION PROGRAMME [23Z02088-4]
- Equivalent to Classroom Learning of Education Program

CFA LEVEL 1 REVISION COURSE AND PRACTICE EXAM [23Z01762-A]
- Equivalent to combination of Classroom Learning of Revision Course plus Mock Exam & Review

Upon "successful completion" of the course, Kaplan Financial will issue you a "Proof of Completion of Course" before 30/09/21. "Successful completion" of the course means that you have attended no less than 70% of the course AND you have attained the passing mark of 50% in the assessment.

Important: Please use Enrollment Form CC01 to enroll. You should read and understand the "Terms and Guidance Notes for Course Registration" overleaf before submitting the form. Other courses, services, and Schweser products are NOT CEF reimbursable.

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

1 Online pre-course
Enroll Education Program/Full Package by early bird deadline for our exclusive online pre-course. **Level I: Approximate 9 hours of online instruction on Fundamental Financial Reporting, Financial Maths, Basic Economics and BAII+ Calculator tips**

2 FREE Schweser Essential Package*
For product availability, please refer to Appendix 12.
Remark: *Terms & conditions apply.

Enroll Education Program/Full Package and get your free set of 2021 Schweser Essential Package in advance



Kaplan Financial (HK) Limited

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

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

LEVEL II - COURSE SCHEDULE (AUG 2021)

Appendix 5

EDUCATION PROGRAM

54 hours

18 sessions

PT = Online Progress Test Release Date		CLASSROOM			ONLINE	
		CLASS A			KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
TRAINER ►		KYLE WONG CANTONESE				
		DATE	DAY	TIME	DATE	DATE
1	Ethical and Professional Standards + Financial Reporting and Analysis	08/05/21	Sat	10:00 - 13:00	Videos will be released by phases from late Jan to mid-Apr	Videos will be released by phases from early Feb to mid-Apr
2	Financial Reporting and Analysis	08/05/21	Sat	14:00 - 17:00		
3	PT1 Financial Reporting and Analysis	15/05/21	Sat	10:00 - 13:00		
4	Corporate Finance	15/05/21	Sat	14:00 - 17:00		
5	Corporate Finance	22/05/21	Sat	10:00 - 13:00		
6	Quantitative Methods	22/05/21	Sat	14:00 - 17:00		
7	Quantitative Methods	29/05/21	Sat	10:00 - 13:00		
8	Economics	29/05/21	Sat	14:00 - 17:00		
9	PT2 Economics + Portfolio Management	05/06/21	Sat	10:00 - 13:00		
10	Portfolio Management	05/06/21	Sat	14:00 - 17:00		
11	Equity	12/06/21	Sat	10:00 - 13:00		
12	Equity	12/06/21	Sat	14:00 - 17:00		
13	Equity + Alternative Investments	19/06/21	Sat	10:00 - 13:00		
14	PT3 Alternative Investments	19/06/21	Sat	14:00 - 17:00		
15	Fixed Income	26/06/21	Sat	10:00 - 13:00		
16	Fixed Income	26/06/21	Sat	14:00 - 17:00		
17	Derivatives	03/07/21	Sat	10:00 - 13:00		
18	PT4 Derivatives	03/07/21	Sat	14:00 - 17:00		

REVISION COURSE

27 hours

9 sessions

TRAINER ►		CLASSROOM			ONLINE	
		CLASS A			KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
		DATE	DAY	TIME		
1	Financial Reporting and Analysis	13/07/21	Tue	19:00 - 22:00	Videos will be released by phases from late Apr to mid-May	Videos will be released by phases from late Apr to mid-May
2	Financial Reporting and Analysis	24/07/21	Sat	10:00 - 13:00		
3	Corporate Finance	24/07/21	Sat	14:00 - 17:00		
4	Quantitative Methods	31/07/21	Sat	10:00 - 13:00		
5	Equity	31/07/21	Sat	14:00 - 17:00		
6	Alternative Investments	07/08/21	Sat	10:00 - 13:00		
7	Fixed Income + Derivatives	07/08/21	Sat	14:00 - 17:00		
8	Portfolio Management + Economics	14/08/21	Sat	10:00 - 13:00		
9	Ethical and Professional Standards	14/08/21	Sat	14:00 - 17:00		

ONLINE MOCK 4.5 hours

DATE	DAY	TIME
21/08/21	Sat	10:00 - 12:15 & 12:45 - 15:00

MOCK EXAM REVIEW 3 hours

CLASS A CANTONESE TRAINER: KYLE WONG				CLASS B ENGLISH TRAINER: JONATHAN LAU			
FORMAT	DATE	DAY	TIME	FORMAT	DATE	DAY	TIME
Classroom	25/08/21	Wed	19:00 - 22:00	Online	Video will be available after 26/08/21		
Online	Same timeslot as above in Live Online Format						

CLASSROOM LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Classroom Full Package	ENROLLED BY 24/04/21	
Education + Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$17,500	\$20,000
Classroom Education Program Only	ENROLLED BY 24/04/21	
Education + Schweser Essential Package (Print & Online)	\$12,900	\$15,000
Classroom Revision Course Only	ENROLLED BY 10/07/21	
	\$7,380	\$9,000
Online Mock & Classroom Review Only	\$1,400	

CEF applicants and holders, please refer to Enrollment Form CC01 and its overleaf for prices and specified terms and conditions.

ONLINE LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Blended Full Package	ENROLLED BY 24/04/21	
Online Education + Classroom Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$17,500	\$20,000
Online Full Package	ENROLLED BY 24/04/21	
Online Education + Online Revision + Online Mock and Online Review + Schweser Essential Package (Print & Online)	\$17,500	\$20,000
Online Education Program Only	ENROLLED BY 24/04/21	
Online Education + Schweser Essential Package (Print & Online)	\$12,900	\$15,000
Online Revision Course Only	ENROLLED BY 10/07/21	
	\$7,380	\$9,000
Online Mock & Online Review Only	\$1,400	

Add on item (For both Classroom & Online Learning): Online Schweser Mock Exam \$600 (original \$800)

TOPICAL ONLINE COURSE	ORIGINAL PRICE
Financial Reporting and Analysis	
Around 7 hours of videos extracted, from Education Program, choice of Cantonese or English. All videos will be available after late Mar 2021 and pdf slide deck included.	\$3,900

Interest-free Installments

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

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

Please enroll in person. Not eligible if you need CEF reimbursement.

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.



Continuing Education Fund

Institute Code : 519

Course Title : Kaplan Financial (HK) Limited

The following courses have been included in the list of reimbursable courses for CEF purpose.

CFA LEVEL 2 EDUCATION PROGRAMME [23Z02089-2]
- Equivalent to Classroom Learning of Education Program

CFA LEVEL 2 REVISION COURSE AND PRACTICE EXAM [23Z01818-9]
- Equivalent to combination of Classroom Learning of Revision Course plus Mock Exam & Review

Upon "successful completion" of the course, Kaplan Financial will issue you a "Proof of Completion of Course" before 30/09/21. "Successful completion" of the course means that you have attended no less than 70% of the course AND you have attained the passing mark of 50% in the assessment.

Important: Please use Enrollment Form CC01 to enroll. You should read and understand the "Terms and Guidance Notes for Course Registration" overleaf before submitting the form. Other courses, services, and Schweser products are NOT CEF reimbursable.

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

1 Online pre-course
Enroll Education Program/Full Package by early bird deadline for our exclusive online pre-course. **Level II: 9 hours of instruction extracted from 2020 exam season**

2 FREE Schweser Essential Package*
For product availability, please refer to Appendix 12.
Remark: *Terms & conditions apply.

Enroll Education Program/Full Package and get your free set of 2021 Schweser Essential Package in advance



Kaplan Financial (HK) Limited

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

Tel : 2526 3686
Fax : 2501 0589

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

LEVEL III - COURSE SCHEDULE (AUG 2021)

Appendix 6

EDUCATION PROGRAM

57 hours

19 sessions

PT = Online Progress Test Release Date		CLASSROOM			ONLINE	
		CLASS A			LARRY YUEN ENGLISH	KYLE WONG CANTONESE
TRAINER ▶		LARRY YUEN ENGLISH				
		DATE	DAY	TIME	DATE	DATE
1	Ethical and Professional Standards + GIPS	14/04/21	Wed	19:00 - 22:00	23/04/21	Videos will be released by phases from early Mar to mid-Apr
2	Behavioral Finance	18/04/21	Sun	10:00 - 13:00	27/04/21	
3	Capital Market Expectations	18/04/21	Sun	14:00 - 17:00	27/04/21	
4	PT1 Capital Market Expectations	25/04/21	Sun	10:00 - 13:00	04/05/21	
5	Asset Allocation	25/04/21	Sun	14:00 - 17:00	04/05/21	
6	Derivatives	02/05/21	Sun	10:00 - 13:00	11/05/21	
7	Currency Management	02/05/21	Sun	14:00 - 17:00	11/05/21	
8	Fixed Income	09/05/21	Sun	10:00 - 13:00	18/05/21	
9	PT2 Fixed Income	09/05/21	Sun	14:00 - 17:00	18/05/21	
10	Equity	16/05/21	Sun	10:00 - 13:00	25/05/21	
11	Equity + Alternative Investments	16/05/21	Sun	14:00 - 17:00	25/05/21	
12	Alternative Investments	23/05/21	Sun	10:00 - 13:00	01/06/21	
13	Private Wealth Management	23/05/21	Sun	14:00 - 17:00	01/06/21	
14	Private Wealth Management	30/05/21	Sun	10:00 - 13:00	08/06/21	
15	PT3 Private Wealth Management	30/05/21	Sun	14:00 - 17:00	08/06/21	
16	Institutional Investors	02/06/21	Wed	19:00 - 22:00	11/06/21	
17	Trading	09/06/21	Wed	19:00 - 22:00	18/06/21	
18	Portfolio Performance Evaluation	13/06/21	Sun	10:00 - 13:00	22/06/21	
19	PT4 Investment Manager Selection and Case Studies	13/06/21	Sun	14:00 - 17:00	22/06/21	

REVISION COURSE

27 hours

9 sessions

		CLASSROOM			ONLINE	
		CLASS A			LARRY YUEN ENGLISH	KYLE WONG CANTONESE
TRAINER ▶		LARRY YUEN ENGLISH				
		DATE	DAY	TIME	DATE	DATE
1	Ethics and Behavioral Finance	23/06/21	Wed	19:00 - 22:00	02/07/21	Videos will be released by phases from mid-Apr to mid-May
2	GIPS and Capital Market Expectation	27/06/21	Sun	10:00 - 13:00	06/07/21	
3	Asset Allocation	27/06/21	Sun	14:00 - 17:00	06/07/21	
4	Derivatives and Currency Management	07/07/21	Wed	19:00 - 22:00	16/07/21	
5	Fixed Income	14/07/21	Wed	19:00 - 22:00	23/07/21	
6	Equity + Alternative Investments	21/07/21	Wed	19:00 - 22:00	30/07/21	
7	Private Wealth Management	28/07/21	Wed	19:00 - 22:00	06/08/21	
8	Private Wealth Management + Institutional Investors	04/08/21	Wed	19:00 - 22:00	10/08/21	
9	Portfolio Performance Evaluation + Investment Manager Selection	11/08/21	Wed	19:00 - 22:00	12/08/21	

ONLINE MOCK

4.5 hours

DATE	DAY	TIME
14/08/21	Sat	10:00 - 12:15 & 12:45 - 15:00

MOCK EXAM REVIEW

3 hours

CLASS A ENGLISH				TRAINER: LARRY YUEN				CLASS B CANTONESE				TRAINER: KYLE WONG				
FORMAT	DATE	DAY	TIME					FORMAT	DATE	DAY	TIME					
Classroom	19/08/21	Thu	19:00 - 22:00					Online	Video will be available after 20/08/21							
Online	Video will be available after 20/08/21															

IPS ESSAY WORKSHOP (RECOMMENDED)

12 hours

4 sessions

		Online	
		CLASS A	
TRAINER ▶		KYLE WONG CANTONESE	
		DATE	
1	Overview: IPS Components, Portfolio Management and Wealth and Planning	Videos will be available in early May	
2	IPS Strategies, Technique Demonstration		
3	Essay Practice and Debriefing, Submit Assignment		
4	Final Debriefing and Tips		

CLASSROOM LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Classroom Full Package	ENROLLED BY 24/04/21	
Education + Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$18,720	\$20,800
Classroom Education Program Only	ENROLLED BY 24/04/21	
Education + Schweser Essential Package (Print & Online)	\$14,365	\$16,900
Classroom Revision Course Only	ENROLLED BY 10/07/21	
	\$8,400	\$10,500
Online Mock & Classroom Review Only	\$1,500	

CEF applicants and holders, please refer to Enrollment Form CC01 and its overleaf for prices and specified terms and conditions.

ONLINE LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Blended Full Package	ENROLLED BY 24/04/21	
Online Education + Classroom Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$18,720	\$20,800
Online Full Package	ENROLLED BY 24/04/21	
Online Education + Online Revision + Online Mock and Online Review + Schweser Essential Package (Print & Online)	\$18,720	\$20,800
Online Education Program Only	ENROLLED BY 24/04/21	
Online Education + Schweser Essential Package (Print & Online)	\$14,365	\$16,900
Online Revision Course Only	ENROLLED BY 10/07/21	
	\$8,400	\$10,500
Online Mock & Online Review Only	\$1,500	
Online IPS Essay Workshop	ENROLLED BY 24/04/21	
	\$6,640	\$8,300

Add on item (For both Classroom & Online Learning): Online Schweser Mock Exam \$600 (original \$800)

Interest-free Installments

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

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

Please enroll in person. Not eligible if you need CEF reimbursement.

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.



Continuing Education Fund

Institute Code : 519

Course Title : Kaplan Financial (HK) Limited

The following courses have been included in the list of reimbursable courses for CEF purpose.

CFA LEVEL 3 EDUCATION PROGRAMME [23202090-6]
- Equivalent to Classroom Learning of Education Program

CFA LEVEL 3 REVISION COURSE AND PRACTICE EXAM [23201819-7]
- Equivalent to combination of Classroom Learning of Revision Course plus Mock Exam & Review

Upon "successful completion" of the course, Kaplan Financial will issue you a "Proof of Completion of Course" before 30/09/21. "Successful completion" of the course means that you have attended no less than 70% of the course AND you have attained the passing mark of 50% in the assessment.

Important: Please use Enrollment Form CC01 to enroll. You should read and understand the "Terms and Guidance Notes for Course Registration" overleaf before submitting the form. Other courses, services, and Schweser products are NOT CEF reimbursable.

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

1

Online pre-course

Enroll Education Program/Full Package by early bird deadline for our exclusive online pre-course. **Level III: 9 hours of instruction extracted from 2020 exam season**

2

FREE Schweser Essential Package*

For product availability, please refer to Appendix 13.
Remark: *Terms & conditions apply.

Enroll Education Program/Full Package and get your free set of 2021 Schweser Essential Package in advance



Kaplan Financial (HK) Limited

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

Tel : 2526 3686
Fax : 2501 0589

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

LEVEL I - COURSE SCHEDULE (NOV 2021)

Appendix 7

EDUCATION PROGRAM

60 hours

20 sessions

PT = Online Progress Test Release Date		CLASSROOM			ONLINE	
		CLASS A			J. LAM CANTONESE	JONATHAN LAU ENGLISH
TRAINER ►		LARRY YUEN CANTONESE				
		DATE	DAY	TIME		
1	Quantitative Methods	27/07/21	Tue	19:00 - 22:00	Videos will be released by phases from late Jan to late Mar	Videos will be released by phases from mid-Feb to mid-Apr
2	Quantitative Methods	31/07/21	Sat	10:00 - 13:00		
3	PT1 Quantitative Methods	31/07/21	Sat	14:00 - 17:00		
4	Financial Reporting and Analysis	07/08/21	Sat	10:00 - 13:00		
5	Financial Reporting and Analysis	07/08/21	Sat	14:00 - 17:00		
6	Financial Reporting and Analysis	10/08/21	Tue	19:00 - 22:00		
7	Financial Reporting and Analysis	14/08/21	Sat	10:00 - 13:00		
8	PT2 Financial Reporting and Analysis	14/08/21	Sat	14:00 - 17:00		
9	Portfolio Management	28/08/21	Sat	10:00 - 13:00		
10	Portfolio Management + Corporate Finance	28/08/21	Sat	14:00 - 17:00		
11	Corporate Finance	04/09/21	Sat	10:00 - 13:00		
12	Equity	04/09/21	Sat	14:00 - 17:00		
13	PT3 Equity	07/09/21	Tue	19:00 - 22:00		
14	Fixed Income	11/09/21	Sat	10:00 - 13:00		
15	Fixed Income	11/09/21	Sat	14:00 - 17:00		
16	Derivatives	14/09/21	Tue	19:00 - 22:00		
17	PT4 Derivatives + Alternative Investments	18/09/21	Sat	10:00 - 13:00		
18	Economics	18/09/21	Sat	14:00 - 17:00		
19	PT5 Economics	25/09/21	Sat	10:00 - 13:00		
20	PT6 Ethical and Professional Standards	25/09/21	Sat	14:00 - 17:00		

REVISION COURSE

27 hours

9 sessions

TRAINER ►		CLASSROOM			ONLINE	
		CLASS A			J. LAM CANTONESE	JONATHAN LAU ENGLISH
		LARRY YUEN CANTONESE				
		DATE	DAY	TIME		
1	Quantitative Methods	05/10/21	Tue	19:00 - 22:00	Videos will be released by phases from mid-Apr to mid-May	Videos will be released by phases from mid-Apr to mid-May
2	Financial Reporting and Analysis	09/10/21	Sat	10:00 - 13:00		
3	Financial Reporting and Analysis	09/10/21	Sat	14:00 - 17:00		
4	Portfolio Management + Corporate Finance	16/10/21	Sat	10:00 - 13:00		
5	Corporate Finance + Equity	16/10/21	Sat	14:00 - 17:00		
6	Equity	23/10/21	Sat	10:00 - 13:00		
7	Fixed Income	23/10/21	Sat	14:00 - 17:00		
8	Derivatives Investments + Alternative Investments	30/10/21	Sat	10:00 - 13:00		
9	Economics + Ethical and Professional Standards	30/10/21	Sat	14:00 - 17:00		

ONLINE MOCK 4.5 hours

DATE	DAY	TIME
06/11/21	Sat	10:00 - 12:15 & 12:45 - 15:00

MOCK EXAM REVIEW

3 hours

CLASS A CANTONESE TRAINER: LARRY YUEN				CLASS B ENGLISH TRAINER: JONATHAN LAU			
FORMAT	DATE	DAY	TIME	FORMAT	DATE	DAY	TIME
Classroom	11/11/21	Thu	19:00 - 22:00	Online	Video will be available after 11/11/21		
Online	Same timeslot as above in Live Online Format						

LEVEL I - COURSE SCHEDULE (NOV 2021)

Appendix 7

CLASSROOM LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Classroom Full Package	ENROLLED BY 17/07/21	
Education + Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$12,750	\$15,000
Classroom Education Program Only	ENROLLED BY 17/07/21	
Education + Schweser Essential Package (Print & Online)	\$10,240	\$12,800
Classroom Revision Course Only	ENROLLED BY 18/09/21	
	\$5,300	\$6,300
Online Mock & Classroom Review Only		\$1,300

CEF applicants and holders, please refer to Enrollment Form CC01 and its overleaf for prices and specified terms and conditions.

ONLINE LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Blended Full Package	ENROLLED BY 17/07/21	
Online Education + Classroom Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$12,750	\$15,000
Online Full Package	ENROLLED BY 17/07/21	
Online Education + Online Revision + Online Mock and Online Review + Schweser Essential Package (Print & Online)	\$12,750	\$15,000
Online Education Program Only	ENROLLED BY 17/07/21	
Online Education + Schweser Essential Package (Print & Online)	\$10,240	\$12,800
Online Revision Course Only	ENROLLED BY 18/09/21	
	\$5,300	\$6,300
Online Mock & Online Review Only		\$1,300

Add on item (For both Classroom & Online Learning): Online Schweser Mock Exam \$600 (original \$800)

TOPICAL ONLINE COURSE	ORIGINAL PRICE
Financial Reporting and Analysis	
Around 15 hours of videos extracted, from Education Program, choice of Cantonese or English. All videos will be available after late Mar 2021 and pdf slide deck included.	\$3,900

Interest-free Installments

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

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

Please enroll in person. Not eligible if you need CEF reimbursement.

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.



Continuing Education Fund

Institute Code : 519

Course Title : Kaplan Financial (HK) Limited

The following courses have been included in the list of reimbursable courses for CEF purpose.

CFA LEVEL 1 EDUCATION PROGRAMME [23Z02088-4]
- Equivalent to Classroom Learning of Education Program

CFA LEVEL 1 REVISION COURSE AND PRACTICE EXAM [23Z01762-A]
- Equivalent to combination of Classroom Learning of Revision Course plus Mock Exam & Review

Upon "successful completion" of the course, Kaplan Financial will issue you a "Proof of Completion of Course" before 31/12/21. "Successful completion" of the course means that you have attended no less than 70% of the course AND you have attained the passing mark of 50% in the assessment.

Important: Please use Enrollment Form CC01 to enroll. You should read and understand the 'Terms and Guidance Notes for Course Registration' overleaf before submitting the form. Other courses, services, and Schweser products are NOT CEF reimbursable.

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

1

Online pre-course

Enroll Education Program/Full Package by early bird deadline for our exclusive online pre-course. **Level I:** Approximate 9 hours of online instruction on Fundamental Financial Reporting, Financial Maths, Basic Economics and BAII+ Calculator tips

2

FREE Schweser Essential Package*

For product availability, please refer to Appendix 12.

Remark: *Terms & conditions apply.

Enroll Education Program/Full Package and get your free set of 2021 Schweser Essential Package in advance



Kaplan Financial (HK) Limited

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

Tel : 2526 3686
Fax : 2501 0589

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

LEVEL II - COURSE SCHEDULE (NOV 2021)

Appendix 8

EDUCATION PROGRAM

54 hours

18 sessions

PT = Online Progress Test Release Date		CLASSROOM			ONLINE	
		CLASS A			KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
TRAINER ►		KYLE WONG CANTONESE				
		DATE	DAY	TIME	DATE	DATE
1	Ethical and Professional Standards + Financial Reporting and Analysis	15/07/21	Thu	19:00 - 22:00	Videos will be released by phases from late Jan to mid-Apr	Videos will be released by phases from early Feb to mid-Apr
2	Financial Reporting and Analysis	20/07/21	Tue	19:00 - 22:00		
3	PT1 Financial Reporting and Analysis	22/07/21	Thu	19:00 - 22:00		
4	Corporate Finance	27/07/21	Tue	19:00 - 22:00		
5	Corporate Finance	29/07/21	Thu	19:00 - 22:00		
6	Quantitative Methods	03/08/21	Tue	19:00 - 22:00		
7	Quantitative Methods	05/08/21	Thu	19:00 - 22:00		
8	Economics	10/08/21	Tue	19:00 - 22:00		
9	PT2 Economics + Portfolio Management	12/08/21	Thu	19:00 - 22:00		
10	Portfolio Management	17/08/21	Tue	19:00 - 22:00		
11	Equity	19/08/21	Thu	19:00 - 22:00		
12	Equity	24/08/21	Tue	19:00 - 22:00		
13	Equity + Alternative Investments	26/08/21	Thu	19:00 - 22:00		
14	PT3 Alternative Investments	02/09/21	Thu	19:00 - 22:00		
15	Fixed Income	07/09/21	Tue	19:00 - 22:00		
16	Fixed Income	09/09/21	Thu	19:00 - 22:00		
17	Derivatives	14/09/21	Tue	19:00 - 22:00		
18	PT4 Derivatives	16/09/21	Thu	19:00 - 22:00		

REVISION COURSE

27 hours

9 sessions

		CLASSROOM			ONLINE	
		CLASS A			KYLE WONG CANTONESE	JONATHAN LAU ENGLISH
TRAINER ►		KYLE WONG CANTONESE				
		DATE	DAY	TIME	DATE	DATE
1	Financial Reporting and Analysis	28/09/21	Tue	19:00 - 22:00	Videos will be released by phases from late Apr to mid-May	Videos will be released by phases from late Apr to mid-May
2	Financial Reporting and Analysis	30/09/21	Thu	19:00 - 22:00		
3	Corporate Finance	05/10/21	Tue	19:00 - 22:00		
4	Quantitative Methods	07/10/21	Thu	19:00 - 22:00		
5	Equity	12/10/21	Tue	19:00 - 22:00		
6	Alternative Investments	19/10/21	Tue	19:00 - 22:00		
7	Fixed Income + Derivatives	21/10/21	Thu	19:00 - 22:00		
8	Portfolio Management + Economics	26/10/21	Tue	19:00 - 22:00		
9	Ethical and Professional Standards	28/10/21	Thu	19:00 - 22:00		

ONLINE MOCK

4.5 hours

DATE	DAY	TIME
06/11/21	Sat	10:00 - 12:15 & 12:45 - 15:00

MOCK EXAM REVIEW

3 hours

CLASS A CANTONESE				TRAINER: KYLE WONG				CLASS B ENGLISH				TRAINER: JONATHAN LAU			
FORMAT	DATE	DAY	TIME	FORMAT	DATE	DAY	TIME	FORMAT	DATE	DAY	TIME	FORMAT	DATE	DAY	TIME
Classroom	10/11/21	Wed	19:00 - 22:00	Online	Video will be available after 10/11/21										
Online	Same timeslot as above in Live Online Format														

LEVEL II - COURSE SCHEDULE (NOV 2021)

Appendix 8

CLASSROOM LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Classroom Full Package	ENROLLED BY 17/07/21	
Education + Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$17,500	\$20,000
Classroom Education Program Only	ENROLLED BY 17/07/21	
Education + Schweser Essential Package (Print & Online)	\$12,900	\$15,000
Classroom Revision Course Only	ENROLLED BY 18/09/21	
	\$7,380	\$9,000
Online Mock & Classroom Review Only		\$1,400

CEF applicants and holders, please refer to Enrollment Form CC01 and its overleaf for prices and specified terms and conditions.

ONLINE LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Blended Full Package	ENROLLED BY 17/07/21	
Online Education + Classroom Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$17,500	\$20,000
Online Full Package	ENROLLED BY 17/07/21	
Online Education + Online Revision + Online Mock and Online Review + Schweser Essential Package (Print & Online)	\$17,500	\$20,000
Online Education Program Only	ENROLLED BY 17/07/21	
Online Education + Schweser Essential Package (Print & Online)	\$12,900	\$15,000
Online Revision Course Only	ENROLLED BY 18/09/21	
	\$7,300	\$9,000
Online Mock & Online Review Only		\$1,400

Add on item (For both Classroom & Online Learning): Online Schweser Mock Exam \$600 (original \$800)

TOPICAL ONLINE COURSE	ORIGINAL PRICE
Financial Reporting and Analysis	\$3,900

Around 7 hours of videos extracted, from Education Program, choice of Cantonese or English. All videos will be available after late Mar 2021 and pdf slide deck included.

Interest-free Installments

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

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

Please enroll in person. Not eligible if you need CEF reimbursement.

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.



持續進修基金
Continuing Education Fund

Continuing Education Fund

Institute Code : 519

Course Title : Kaplan Financial (HK) Limited

The following courses have been included in the list of reimbursable courses for CEF purpose.

CFA LEVEL 2 EDUCATION PROGRAMME [23Z02089-2]
- Equivalent to Classroom Learning of Education Program

CFA LEVEL 2 REVISION COURSE AND PRACTICE EXAM [23Z01818-9]
- Equivalent to combination of Classroom Learning of Revision Course plus Mock Exam & Review

Upon "successful completion" of the course, Kaplan Financial will issue you a "Proof of Completion of Course" before 31/12/21. "Successful completion" of the course means that you have attended no less than 70% of the course AND you have attained the passing mark of 50% in the assessment.

Important: Please use Enrollment Form CC01 to enroll. You should read and understand the 'Terms and Guidance Notes for Course Registration' overleaf before submitting the form. Other courses, services, and Schweser products are NOT CEF reimbursable.

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

1

Online pre-course

Enroll Education Program/Full Package by early bird deadline for our exclusive online pre-course. **Level II: 9 hours of instruction extracted from 2020 exam season**

2

FREE Schweser Essential Package*

For product availability, please refer to Appendix 12.
Remark: *Terms & conditions apply.

Enroll Education Program/Full Package and get your free set of 2021 Schweser Essential Package in advance



Kaplan Financial (HK) Limited

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

Tel : 2526 3686
Fax : 2501 0589

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

LEVEL III - COURSE SCHEDULE (NOV 2021)

Appendix 9

EDUCATION PROGRAM

57 hours

19 sessions

PT = Online Progress Test Release Date		CLASSROOM			ONLINE	
		CLASS A			KYLE WONG CANTONESE	LARRY YUEN ENGLISH
TRAINER ►		KYLE WONG CANTONESE				
		DATE	DAY	TIME		
1	Ethical and Professional Standards + GIPS	14/07/21	Wed	19:00 - 22:00	Videos will be released by phases from early Mar to mid-Apr	Videos will be released by phases from late Apr to late Jun
2	Behavioral Finance	25/07/21	Sun	10:00 - 13:00		
3	Capital Market Expectations	25/07/21	Sun	14:00 - 17:00		
4	PT1 Capital Market Expectations	01/08/21	Sun	10:00 - 13:00		
5	Asset Allocation	01/08/21	Sun	14:00 - 17:00		
6	Derivatives	08/08/21	Sun	10:00 - 13:00		
7	Currency Management	08/08/21	Sun	14:00 - 17:00		
8	Fixed Income	15/08/21	Sun	10:00 - 13:00		
9	PT2 Fixed Income	15/08/21	Sun	14:00 - 17:00		
10	Equity	21/08/21	Sat	10:00 - 13:00		
11	Equity + Alternative Investments	21/08/21	Sat	14:00 - 17:00		
12	Alternative Investments	28/08/21	Sat	10:00 - 13:00		
13	Private Wealth Management	28/08/21	Sat	14:00 - 17:00		
14	Private Wealth Management	04/09/21	Sat	10:00 - 13:00		
15	PT3 Private Wealth Management	04/09/21	Sat	14:00 - 17:00		
16	Institutional Investors	11/09/21	Sat	10:00 - 13:00		
17	Trading	11/09/21	Sat	14:00 - 17:00		
18	Portfolio Performance Evaluation	18/09/21	Sat	10:00 - 13:00		
19	PT4 Investment Manager Selection and Case Studies	18/09/21	Sat	14:00 - 17:00		

REVISION COURSE

27 hours

9 sessions

TRAINER ►		CLASSROOM			ONLINE	
		CLASS A			KYLE WONG CANTONESE	LARRY YUEN ENGLISH
		KYLE WONG CANTONESE				
		DATE	DAY	TIME		
1	Ethics and Behavioral Finance	29/09/21	Wed	19:00 - 22:00	Videos will be released by phases from mid-Apr to mid-May	Videos will be released by phases from mid-Jul to mid-Aug
2	GIPS and Capital Market Expectation	02/10/21	Sat	10:00 - 13:00		
3	Asset Allocation	02/10/21	Sat	14:00 - 17:00		
4	Derivatives and Currency Management	09/10/21	Sat	10:00 - 13:00		
5	Fixed Income	09/10/21	Sat	14:00 - 17:00		
6	Equity + Alternative Investments	16/10/21	Sat	10:00 - 13:00		
7	Private Wealth Management	16/10/21	Sat	14:00 - 17:00		
8	Private Wealth Management + Institutional Investors	23/10/21	Sat	10:00 - 13:00		
9	Portfolio Performance Evaluation + Investment Manager Selection	23/10/21	Sat	14:00 - 17:00		

ONLINE MOCK

4.5 hours

DATE	DAY	TIME
06/11/21	Sat	10:00 - 12:15 & 12:45 - 15:00

MOCK EXAM REVIEW

3 hours

CLASS A CANTONESE TRAINER: KYLE WONG				CLASS B ENGLISH TRAINER: LARRY YUEN			
FORMAT	DATE	DAY	TIME	FORMAT	DATE	DAY	TIME
Classroom	17/11/21	Wed	19:00 - 22:00	Online	Video will be available after 17/11/21		
Online	Same timeslot as above in Live Online Format						

IPS ESSAY WORKSHOP (RECOMMENDED)

12 hours

4 sessions

TRAINER ►		CLASSROOM		
		CLASS A		
		KYLE WONG CANTONESE		
		DATE	DAY	TIME
1	Overview: IPS Components, Portfolio Management and Wealth and Planning	13/10/21	Wed	19:00 - 22:00
2	IPS Strategies, Technique Demonstration	20/10/21	Wed	19:00 - 22:00
3	Essay Practice and Debriefing, Submit Assignment	27/10/21	Wed	19:00 - 22:00
4	Final Debriefing and Tips	03/11/21	Wed	19:00 - 22:00

CLASSROOM LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Classroom Full Package	ENROLLED BY 17/07/21	
Education + Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$18,720	\$20,800
Classroom Education Program Only	ENROLLED BY 17/07/21	
Education + Schweser Essential Package (Print & Online)	\$14,365	\$16,900
Classroom Revision Course Only	ENROLLED BY 18/09/21	
	\$8,400	\$10,500
Online Mock & Classroom Review Only		\$1,500
Classroom IPS Essay Workshop	ENROLLED BY 02/10/21	
	\$6,640	\$8,300

CEF applicants and holders, please refer to Enrollment Form CC01 and its overleaf for prices and specified terms and conditions.

ONLINE LEARNING	EARLY BIRD PRICE	ORIGINAL PRICE
Blended Full Package	ENROLLED BY 17/07/21	
Online Education + Classroom Revision + Online Mock and Classroom Review + Schweser Essential Package (Print & Online)	\$18,720	\$20,800
Online Full Package	ENROLLED BY 17/07/21	
Online Education + Online Revision + Online Mock and Online Review + Schweser Essential Package (Print & Online)	\$18,720	\$20,800
Online Education Program Only	ENROLLED BY 17/07/21	
Online Education + Schweser Essential Package (Print & Online)	\$14,365	\$16,900
Online Revision Course Only	ENROLLED BY 18/09/21	
	\$8,400	\$10,500
Online Mock & Online Review Only		\$1,500

Add on item (For both Classroom & Online Learning): Online Schweser Mock Exam \$600 (original \$800)

Interest-free Installments

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

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

Please enroll in person. Not eligible if you need CEF reimbursement.

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.



Continuing Education Fund

Institute Code : 519

Course Title : Kaplan Financial (HK) Limited

The following courses have been included in the list of reimbursable courses for CEF purpose.

CFA LEVEL 3 EDUCATION PROGRAMME [23Z02090-6]
- Equivalent to Classroom Learning of Education Program

CFA LEVEL 3 REVISION COURSE AND PRACTICE EXAM [23Z01819-7]
- Equivalent to combination of Classroom Learning of Revision Course plus Mock Exam & Review

Upon "successful completion" of the course, Kaplan Financial will issue you a "Proof of Completion of Course" before 31/12/21. "Successful completion" of the course means that you have attended no less than 70% of the course AND you have attained the passing mark of 50% in the assessment.

Important: Please use Enrollment Form CC01 to enroll. You should read and understand the "Terms and Guidance Notes for Course Registration" overleaf before submitting the form. Other courses, services, and Schweser products are NOT CEF reimbursable.

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

1

Online pre-course

Enroll Education Program/Full Package by early bird deadline for our exclusive online pre-course. **Level III: 9 hours of instruction extracted from 2020 exam season**

2

FREE Schweser Essential Package*

For product availability, please refer to Appendix 13.
Remark: *Terms & conditions apply.

Enroll Education Program/Full Package and get your free set of 2021 Schweser Essential Package in advance



Kaplan Financial (HK) Limited

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

Tel : 2526 3686
Fax : 2501 0589

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

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

Get a \$4,900 rebate if you purchased Schweser Packages from Kaplan HK first and sign up Kaplan selective courses later[^]

[^]Kaplan selective courses include Classroom Full Package, Classroom Education Program, Blended Full Package, Online Full Package and Online Education Program for CFA 2021 Feb & May exam.

STUDY PACKAGE		PremiumPlus™ Package	Premium Package	Essential Package	Product Availability
		HK\$11,300	HK\$7,000	HK\$4,900	Level I
ONLINE INSTRUCTION					
Live Online Weekly Class* (US Time)	Online	●			5 Jan - 13 Apr 2021
OnDemand Class	Online		●		Available Now
Weekly Class Workbooks, Vol. 1 & 2	Print	●			Mid Oct 2020
OnDemand Class Workbooks, Vol. 1 & 2	Online		●		Mid Oct 2020
InstructorLink	Online	●	●	●	Available Now
STUDY NOTES AND PRATICE TOOLS					
SchweserNotes™ Vol. 1-5 - include Topic Quizzes	Print, eBook & Online	●	●	●	Available Now
QuickSheet*	Print & eBook	●	●	●	Available Now
SchweserNotes™ Videos	Online	●	●	●	Available Now
Practice Exams (4 in 1)	Online	●	●	●	Late Nov 2020
Checkpoint Exams	Online	●	●	●	Available Now
SchweserPro™ QBank	Online	●	●	●	Available Now
Resource Library	Online	●	●	●	Available Now
FINAL REVIEW					
Live Online Review Workshop (3-Day)	Online	●			Apr 2021
OnDemand Review Workshop	Online		●		May exam: TBC
Review Workshop Workbook Set	Print (For PremiumPlus™ Package) Online (For Premium Package)	● Print	● Online		Print - Late Dec 2020 Online - TBC
Secret Sauce®*	Print, eBook & Online	●	●		Print - Late Dec 2020 eBook & Online - Early Dec 2020
PASS GUARANTEE					
Schweser Commitment and PassProtection™	Print, eBook & Online	●	●	●	

Product availabilities 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.

*eBook version of SchweserNotes™, Secret Sauce® and QuickSheet can only be viewed through VitalSource® with limited access period. For more information regarding VitalSource®, please visit our FAQ page. (https://www.schweser.com/faq?344-1_active=4)

#Class schedule: Exact schedule and trainers (TBC)

The Schweser Commitment

Receive the same version of study package
Free of charge for the following exam

You are eligible if you meet the following criteria :

- Available for 2021 purchasers of the Essential, Premium, or PremiumPlus™ Packages.
- You must answer at least 50% of your available online questions (i.e., QBank, Topic Assessments, and Practice Exams).

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

- 1 2021 exam fail notice
- 2 Following exam registration notice
- 3 Schweser Commitment Application Form

PassProtection™

If don't meet the above criteria, still receive
up to 50% off your same-level purchases for the following 2022 exam

You are eligible if you meet the following criteria :

- Available for 2021 PremiumPlus™, Premium, and Essential Package purchasers, who will retake the exam for the same level in 2022, are eligible to receive 50% off for PremiumPlus™, Premium and Essential Packages.

In order to enjoy the PassProtection™ discount you must attach the following documents with order form:

- 1 2021 exam fail notice for same level
- 2 Following exam registration notice for same level
- 3 Order form

PremiumPlus™, Premium or
Essential Package
2020 purchasers

PassProtection™ Discount

50% off

PremiumPlus™
or Premium
Package

Product Details

Weekly Class

Live Online (PremiumPlus™ Package)
 • 45 hours of live online classes with archived

OnDemand (Premium Package)
 • 50 hours of recorded video lectures
 • 5 live online workshops on exam application and problem



Review Workshops (Print/Online)

Live Online HK\$4,300

Live Online (PremiumPlus™ Package)
 • 3 full days of live expert instruction and review

OnDemand (Premium Package)
 • 30 hours of recorded video on review sessions

Review workshop also comes with Secret Sauce® (Print, eBook & Online) and Review Workshop Workbook Set (print version for PremiumPlus™ Package & online version for Premium Package)



SchweserNotes™ Vol. 1-5 + Quicksheet (Print & Online)

HK\$3,700

More than just textbooks. This 5-volume set breaks down the CFA Program curriculum into bite-sized segments that help you learn and retain the Learning Outcome Statements.



Quicksheet (Print/Online)

HK\$300

Review on-the-go with this compact study tool that summarizes key formulas, definitions, and concepts needed to pass the CFA exam.



Practice Exams 1-4 (Online)

**Each Practice Exam: HK\$460
 4 in 1 Package: HK\$1,700**

Identify opportunities to strengthen your trouble areas and complete your knowledge base with four full-length practice exams.



SchweserPro™ QBank (Online)

HK\$1,500

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



Flashcard Set (Print & Online)

HK\$1,200

Test your knowledge of every Learning Outcome Statement whenever you have 15 minutes to spare with this portable study tool.

Available in Mid Oct 2020



Schweser's Secret Sauce® (Print & eBook/eBook)

HK\$1,200

Offers concise, readable explanations of the major parts of the CFA Program curriculum and gives you essential exam strategies and guidance on how to pass the exam.



Online Schweser Mock Exam

HK\$800

The Online Schweser Mock Exam is as close as you can get to the actual CFA Program exam in format, difficulty, and length. The Mock Exam helps develop your test-taking skills, identify your weak areas, and demonstrate your mastery of the CFA Program curriculum.

Available in Jan 2021



Understanding Your Financial Calculator (Print)

HK\$550

Demonstrates the keystrokes, shortcut methods, and underlying calculation concepts for the HP 12C and TI-BAll Plus calculators.



Other Online Features

Instructor Link

Connect with a CFA instructor for personal assistance anytime as you prepare for the exam. They are ready and willing to answer your exam and content-related questions. Have your questions answered by expert faculty within 24-48 hours.

Resource Library

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

System Requirement:



For PC:
 Mac OS X 10.8+, Window XP+,
 Chrome 60+, Firefox 28+, IE 9+

For Moblie:
 Apple iOS 6+,
 Google Android 4.1-4.5

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[^]Kaplan selective courses include Classroom Full Package, Classroom Education Program, Blended Full Package, Online Full Package and Online Education Program for CFA 2021 May exam.

STUDY PACKAGE		PremiumPlus™ Package	Premium Package	Essential Package	Product Availability	
		HK\$10,800	HK\$7,800	HK\$4,900	Level II	Level III
ONLINE INSTRUCTION						
Live Online Weekly Class* (US Time)	Online	●	●		6 Jan - 14 Apr 2021	14 Jan - 22 Apr 2021
Weekly Class Workbooks, Vol. 1 & 2	Print & Online	●	●		Print - Late Dec 2020 Online - Early Dec 2020	
InstructorLink	Online	●	●	●	Available Now	
STUDY NOTES AND PRATICE TOOLS						
SchweserNotes™ Vol. 1-5 - include Topic Quizzes	Print, eBook & Online	●	●	●	Print - Late Oct 2020 eBook & Online - Available Now	
QuickSheet*	Print & eBook	●	●	●	Print - Late Oct 2020 eBook - Available Now	
SchweserNotes™ Videos	Online	●	●	●	Available Now	
Practice Exams (4 in 1)	Online	●	●	●	Late Jan 2021	Late Feb 2021
Checkpoint Exams	Online	●	●	●	Available Now	TBC
SchweserPro™ QBank	Online	●	●	●	Available Now	
Resource Library	Online	●	●	●	Available Now	
FINAL REVIEW						
OnDemand Review Workshop	Online	●			Apr 2021	
Review Workshop Workbook Set	Print & Online	●			Print - Late Mar 2021 Online - Early Mar 2021	
Secret Sauce®*	Print, eBook & Online	●			Print - Late Mar 2021 Online - Early Mar 2021	
SCHWESER COMMITMENT						
Schweser Commitment and PassProtection™	Print, eBook & Online	●	●	●		

Product availabilities 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.

*eBook version of SchweserNotes™, Secret Sauce® and QuickSheet can only be viewed through VitalSource® with limited access period. For more information regarding VitalSource®, please visit our FAQ page. (https://www.schweser.com/faq?344-1_active=4)

#Class schedule: In US time, exact schedule and trainers (TBC)

The Schweser Commitment

Receive the same version of study package
Free of charge for the following exam

You are eligible if you meet the following criteria :

- Available for 2021 purchasers of the Essential, Premium, or PremiumPlus™ Packages.
- You must answer at least 50% of your available online questions (i.e., QBank, Topic Assessments, and Practice Exams).

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

- 1 2021 exam fail notice
- 2 Following exam registration notice
- 3 Schweser Commitment Application Form

PassProtection™

If don't meet the above criteria, still receive
up to 50% off your same-level purchases for the following 2022 exam

You are eligible if you meet the following criteria :

- Available for 2021 PremiumPlus™, Premium, and Essential Package purchasers, who will retake the exam for the same level in 2022, are eligible to receive 50% off for PremiumPlus™, Premium and Essential Packages.

In order to enjoy the PassProtection™ discount you must attach the following documents with order form:

- 1 2021 exam fail notice for same level
- 2 Following exam registration notice for same level
- 3 Order form

PremiumPlus™, Premium or
Essential Package
2020 purchasers

PassProtection™ Discount

50% off

PremiumPlus™
or Premium
Package

Product Details

Weekly Class

Live Online
 • 45 hours of live online classes with archived



Review Workshops (Print/Online) HK\$5,000

OnDemand
 • 30 hours of recorded video on review sessions
 • 2 live online workshop sessions



Review workshop also comes with Secret Sauce® (Print, eBook & Online) and Review Workshop Workbook Set (Print & Online)

SchweserNotes™ Vol. 1-5 + Quicksheet (Print & Online) HK\$3,700

More than just textbooks. This 5-volume set breaks down the CFA Program curriculum into bite-sized segments that help you learn and retain the Learning Outcome Statements.



Quicksheet (Print/Online) HK\$300

Review on-the-go with this compact study tool that summarizes key formulas, definitions, and concepts needed to pass the CFA exam.



Practice Exams 1-4 (Online) Each Practice Exam: HK\$460 4 in 1 Package: HK\$1,700

Identify opportunities to strengthen your trouble areas and complete your knowledge base with four full-length practice exams.



SchweserPro™ QBank (Online) HK\$2,500

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



Flashcard Set (Print & Online) HK\$1,200

Test your knowledge of every Learning Outcome Statement whenever you have 15 minutes to spare with this portable study tool.



Available in Early Mar 2021 (TBC)

Schweser's Secret Sauce® (Print & eBook/eBook) HK\$1,100

Offers concise, readable explanations of the major parts of the CFA Program curriculum and gives you essential exam strategies and guidance on how to pass the exam.



Online Schweser Mock Exam HK\$800

The Online Schweser Mock Exam is as close as you can get to the actual CFA Program exam in format, difficulty, and length. The Mock Exam helps develop your test-taking skills, identify your weak areas, and demonstrate your mastery of the CFA Program curriculum.



Available in Apr 2021

Other Online Features

Instructor Link

Connect with a CFA instructor for personal assistance anytime as you prepare for the exam. They are ready and willing to answer your exam and content-related questions. Have your questions answered by expert faculty within 24-48 hours.

Resource Library

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

System Requirement:



For PC:
 Mac OS X 10.8+, Window XP+,
 Chrome 60+, Firefox 28+, IE 9+

For Moblie:
 Apple iOS 6+,
 Google Android 4.1-4.5

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Level I & II - Kaplan Schweser Study Package (AUG & NOV 2021) Appendix 12

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[^]Kaplan selective courses include Classroom Full Package, Classroom Education Program, Blended Full Package, Online Full Package and Online Education Program for CFA 2021 Aug & Nov exam.

STUDY PACKAGE		PremiumPlus™ Package	Premium Package	Essential Package	Product Availability	
		HK\$11,300	HK\$7,000	HK\$4,900	Level I	Level II
ONLINE INSTRUCTION						
Live Online Weekly Class [#] (US Time)	Online	●			Aug exam: 14 Apr - 21 Jul 2021 Nov exam: 8 Jul - 14 Oct 2021	Aug exam: 21 Apr - 28 Jul 2021 Nov exam: TBC
OnDemand Class	Online		●		Available Now	Available Now
Weekly Class Workbooks, Vol. 1 & 2	Print	●				
OnDemand Class Workbooks, Vol. 1 & 2	Online		●			
InstructorLink	Online	●	●	●		
STUDY NOTES AND PRACTICE TOOLS						
SchweserNotes™ Vol. 1-5 - include Topic Quizzes	Print, eBook & Online	●	●	●	Available Now	Available Now
QuickSheet*	Print & eBook	●	●	●		
SchweserNotes™ Videos	Online	●	●	●		
Practice Exams (4 in 1)	Online	●	●	●		
Checkpoint Exams	Online	●	●	●		
SchweserPro™ QBank	Online	●	●	●		
Resource Library	Online	●	●	●		
FINAL REVIEW						
Live Online Review Workshop (3-Day)	Online	●			Aug exam: mid-Apr 2021 Nov exam: late Oct 2021	Aug exam: Late Jul 2021 Nov exam: TBC
OnDemand Review Workshop	Online		●		Available Now	Apr 2021
Review Workshop Workbook Set	Print (PremiumPlus™ Package) Online (Premium Package)	● Print	● Online		Print - Late Jan 2021 Online - Available Now	Print - Late Mar 2021 Online - Early Mar 2021
Secret Sauce®*	Print, eBook & Online	●	●		Available Now	Print - Late Mar 2021 Online - Early Mar 2021
PASS GUARANTEE						
Schweser Commitment and PassProtection™	Print, eBook & Online	●	●	●		

Product availabilities 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.

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PremiumPlus™, Premium or
Essential Package
2020 purchasers

PassProtection™ Discount

50% off PremiumPlus™
or Premium
Package

Product Details

Weekly Class

- Live Online (PremiumPlus™ Package)
- 45 hours of live online classes with archived
- OnDemand (Premium Package)
- 50 hours of recorded video lectures
 - 5 live online workshops on exam application and problem



Review Workshops (Print/Online)

Live Online HK\$4,300

- Live Online (PremiumPlus™ Package)
- 3 full days of live expert instruction and review

- OnDemand (Premium Package)
- 30 hours of recorded video on review sessions

Review workshop also comes with Secret Sauce® (Print, eBook & Online) and Review Workshop Workbook Set (print version for PremiumPlus™ Package & online version for Premium Package)



SchweserNotes™ Vol. 1-5 + Quicksheet

(Print & Online)

HK\$3,700

More than just textbooks. This 5-volume set breaks down the CFA Program curriculum into bite-sized segments that help you learn and retain the Learning Outcome Statements.



Quicksheet (Print/Online)

HK\$300

Review on-the-go with this compact study tool that summarizes key formulas, definitions, and concepts needed to pass the CFA exam.



Practice Exams 1-4 (Online)

Each Practice Exam: HK\$460
4 in 1 Package: HK\$1,700

Identify opportunities to strengthen your trouble areas and complete your knowledge base with four full-length practice exams.



SchweserPro™ QBank (Online)

HK\$1,500

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



Flashcard Set (Print & Online)

HK\$1,200

Test your knowledge of every Learning Outcome Statement whenever you have 15 minutes to spare with this portable study tool.

Available in Mid Oct 2020



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HK\$1,200

Offers concise, readable explanations of the major parts of the CFA Program curriculum and gives you essential exam strategies and guidance on how to pass the exam.



Online Schweser Mock Exam

HK\$800

The Online Schweser Mock Exam is as close as you can get to the actual CFA Program exam in format, difficulty, and length. The Mock Exam helps develop your test-taking skills, identify your weak areas, and demonstrate your mastery of the CFA Program curriculum.

Level I: available in Jan 2021
Level II: available in Apr 2021



Understanding Your Financial Calculator (Print)

HK\$550

Demonstrates the keystrokes, shortcut methods, and underlying calculation concepts for the HP 12C and TI-BAII Plus calculators.



Other Online Features

Instructor Link

Connect with a CFA instructor for personal assistance anytime as you prepare for the exam. They are ready and willing to answer your exam and content-related questions. Have your questions answered by expert faculty within 24-48 hours.

Resource Library

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

System Requirement:



For PC:
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		HK\$10,800	HK\$7,800	HK\$4,900	Level III
ONLINE INSTRUCTION					
Live Online Weekly Class [#] (US Time)	Online	●	●		Aug exam: 30 Mar - 6 Jul 2021 Nov exam: From early Jul 2021
Weekly Class Workbooks, Vol. 1 & 2	Print	●	●		Available Now
InstructorLink	Online	●	●	●	Available Now
STUDY NOTES AND PRATICE TOOLS					
SchweserNotes™ Vol. 1-5 - include Topic Quizzes	Print, eBook & Online	●	●	●	Available Now
QuickSheet*	Print & eBook	●	●	●	Available Now
SchweserNotes™ Videos	Online	●	●	●	Available Now
Practice Exams (4 in 1)	Online	●	●	●	Mid-Feb 2021
Checkpoint Exams	Online	●	●	●	Available Now
SchweserPro™ QBank	Online	●	●	●	Available Now
Resource Library	Online	●	●	●	Available Now
FINAL REVIEW					
OnDemand Review Workshop	Online	●			Apr 2021
Review Workshop Workbook Set	Print & Online	●			Print - late Mar2021 Online - early Mar 2021
Secret Sauce®*	Print, eBook & Online	●			Print - late Mar2021 Online - early Mar 2021
PASS GUARANTEE					
Schweser Commitment and PassProtection™	Print, eBook & Online	●	●	●	

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PremiumPlus™, Premium or
Essential Package
2020 purchasers

PassProtection™ Discount
50% off
PremiumPlus™
or Premium
Package

Product Details

Weekly Class

Live Online
 • 45 hours of live online classes with archived



Review Workshops (Print/Online) HK\$5,000

OnDemand
 • 30 hours of recorded video on review sessions
 • 2 live online workshop sessions



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SchweserNotes™ Vol. 1-5 + Quicksheet (Print & Online) HK\$3,700

More than just textbooks. This 5-volume set breaks down the CFA Program curriculum into bite-sized segments that help you learn and retain the Learning Outcome Statements.



Quicksheet (Print/Online) HK\$300

Review on-the-go with this compact study tool that summarizes key formulas, definitions, and concepts needed to pass the CFA exam.



Practice Exams 1-4 (Online) Each Practice Exam: HK\$460 4 in 1 Package: HK\$1,700

Identify opportunities to strengthen your trouble areas and complete your knowledge base with four full-length practice exams.



SchweserPro™ QBank (Online) HK\$2,500

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



Flashcard Set (Print & Online) HK\$1,200

Test your knowledge of every Learning Outcome Statement whenever you have 15 minutes to spare with this portable study tool.



Available in Early Mar 2021 (TBC)

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Available in Apr 2021

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For PC:
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 Google Android 4.1-4.5

Kaplan Financial (HK) Limited

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