

# KAPLAN CFA SCHWESER STUDY PACKAGE

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

**Exclusive Sale  
in Kaplan HK**

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



		Premium Package	Premium Package	Essential Package <sup>^</sup>
	LEVEL I	HK\$11,200	HK\$8,000	HK\$5,700
	LEVEL II	HK\$11,500	HK\$8,400	HK\$6,100
	LEVEL III	HK\$11,800	HK\$8,800	HK\$6,500
CORE (STUDY TOOLS)				
SchweserNotes™ with Quicksheet* - include Module Quizzes & topic Quizzes	Print, eBook & Online	✓	✓	Online & eBook only
Quicksheet*	Print, eBook	✓	✓	eBook only
Module Videos	Online	✓	✓	✓
SchweserPro™ Qbank	Online	✓	✓	✓
Checkpoint Exams	Online	✓	✓	✓
Mock Exam (1-6)	Online	✓	✓	Mock exam 1-4 only
Resource Library	Online	✓	✓	✓
InstructorLink	Online	✓	-	-
INSTRUCTION				
OnDemand Class	Online	✓	✓	✓
Masterclass Workbooks	Print & Online	✓	Online only	Online only
CFA Institute Question Review Videos	Online	✓	✓	✓
FINAL REVIEW				
OnDemand Review Workshop	Online	✓	✓	-
Review Workshop Workbooks	Print & Online	✓	Online only	-
Secret Sauce®*	Print, eBook & Online	✓	✓	-
OTHER RESOURCES				
Flashcards	Print & Online	✓	-	-
PassProtection™	Online	✓	✓	✓

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

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

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

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



## The Schweser PassProtection™

**Free  
OF CHARGE**  
for a second chance

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



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











Are registered to retake your CFA exam.

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

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

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

## KAPLAN SCHWESER PRODUCT DETAILS

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

## OTHER ONLINE FEATURES

### CFA Institute Question Review Videos

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

### Instructor Link

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

### Resource Library

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

### Module Videos

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

### Checkpoint Exams

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

### JumpStart

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

### Kaplan Schweser Community

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

## 1 Personal Particulars

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

I am a  New Student  Old Student

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

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

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

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

\*HKID/ Passport No.: \_\_\_\_\_  
(First 4 digits. i.e. A123)

Nationality: \_\_\_\_\_  
(This field must be completed if a passport no. is provided)

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

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

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

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

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

## 2 Exam Semester\*

Feb  May  Aug  Nov

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

3 Choose Level III Pathway:  Portfolio Management  Private Wealth  Private Markets

Schweser Packages	Level I	Level II	Level III
<b>Ultimate Package</b> SchweserNotes™ (Print)* Essential Package + QuickSheet (Print) + Mock Exams (5-6) + Masterclass Workbooks (Print)	<input type="checkbox"/> \$11,200	<input type="checkbox"/> \$11,500	<input type="checkbox"/> \$11,800
OnDemand Review Workshop Review Workshop Workbooks (Print & Online) Secret Sauce (Print, eBook & Online) Flashcards (Print & Online)			
<b>Premium (OnDemand) Package</b> SchweserNotes™ (Print)* Essential Package + QuickSheet (Print) + Mock Exams (5-6)	<input type="checkbox"/> \$8,000	<input type="checkbox"/> \$8,400	<input type="checkbox"/> \$8,800
OnDemand Review Workshop Review Workshop Workbooks (Online) Secret Sauce (Print, eBook & Online)			
<b>Essential Package</b> SchweserNotes™ (eBook & Online)* QuickSheet (eBook) Module Videos SchweserPro™ Qbank Checkpoint Exams Mock Exams (1-4)	<input type="checkbox"/> \$5,700	<input type="checkbox"/> \$6,100	<input type="checkbox"/> \$6,500
Resource Library InstructorLink OnDemand Masterclass Masterclass Workbooks (Online) CFA Institute Question Review Videos PassProtection™			
<b>Add-on: SchweserNotes™ with Quicksheet (Printed)</b> <i>Only Applicable on Essential Package</i>	<input type="checkbox"/> \$1,200	<input type="checkbox"/> \$1,200	<input type="checkbox"/> \$1,200
<b>Others</b>			
Texas Instruments BA-II Plus™ Financial Calculator		<input type="checkbox"/> \$380	

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

**Total Payable**

## 4 Method of Payment

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

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

Credit Card (full payment)  VISA  AMEX  MasterCard

For Email, Fax and Post Order Only

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

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

### Declarations

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

Signature \_\_\_\_\_

Date \_\_\_\_\_

### FOR OFFICIAL USE ONLY:

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

## Important

In order to ensure your order is processed, you are asked to ensure that you (1) read the details on the brochure and order form, (2) provide all the information required and (3) submit all the necessary document required in support of your order. We strongly advise you to submit your order form as early as possible. This will enable us to process it more quickly. Products will not be reserved for incomplete order package returned to Kaplan.  
Kaplan requires students to conduct themselves in accordance with the standards of their future professions. You can find students' responsibilities information at <https://www.kaplan.com.hk/code-of-conduct>.

## Payment Methods

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

## Terms and Conditions

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

### Enrollment Policy

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

### Cancellation Policy

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

### Copyright Policy

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### Kaplan Schweser Purchase

7. Sales of all products are final, non-refundable and non-returnable once order is placed and payment received.
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10. After the order is successfully processed, you will receive login information assigned by Kaplan Schweser within seven working days. It is a limited license to use the content only between the times of access is granted and the end of the month after the exam of your enrolled semester. Kaplan bears no responsibility to extend the access period, regardless of purchasers actual exam date.
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### Feedback Mechanism

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

### Ethics and Standards of Professional Conduct

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

### Education Bureau Required Disclaimer

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

### Personal Data Protection

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

### Code of Conduct

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

## Kaplan Financial (HK) Limited

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

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

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

## E-Tech Centre Campus

G/F to 3/F, E-Tech Centre, Nos 402-406

Hennessy Road, Wanchai, Hong Kong

(Causeway Bay MTR Exit A)