

CFA PROGRAM 2026

Level

Chartered Financial Analysi

- Leading Global Provider Top provider in offering all 3 levels of CFA® Program training in Hong Kong with a proven track record across 50+ locations worldwide.
- Expert Trainer
 Satisfaction Rate hits:80%#
- eLearning Platform We provide an eLearning platform for students to watch the Catch-up Videos on any device.
- Pre-requisite Reading Video* Course notes and videos are provided to build a strong foundation.







1 (852) 2526 3686



(#) www.kaplan.com.hk/kfm



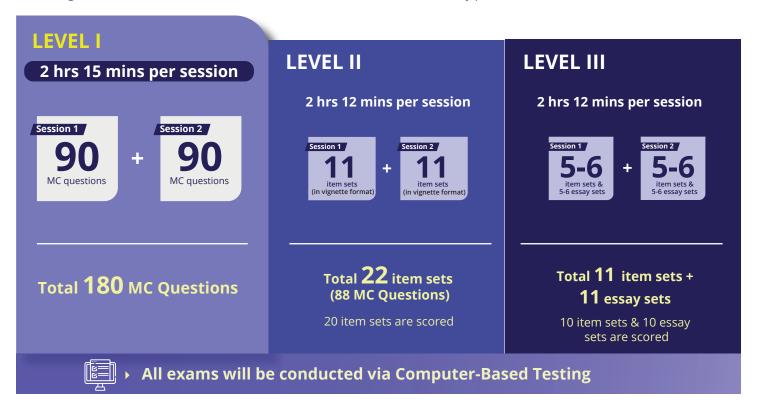
5628 8939 Whatsapp Chat With Us Now

CFA® PROGRAM

The Chartered Financial Analyst (CFA®) Program sets the global standard for professionals in the financial sector, providing them with investment knowledge and ethical principles. Earning a CFA® charter puts you one step ahead in your journey to becoming a financial professional.

EXAM STRUCTURE

The CFA® exam is a three-part exam designed to equip you with real-world skills in investment analysis and forms the core of the CFA® Program. The CFA Institute recommends a **minimum of 300 hours** of study per level.



TOPIC AREA WEIGHTS

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

Exam Period	Exam Level	Early Registration Period	Registration Deadline	Exam Dates	
Feb	1	29 Apr - 7 Jul 2025	29 Oct 2025	> 2 - 8 Feb 2026	
100	III	237.6. 7 Jul 2023	27 000 2023	29 Jan - 1 Feb 2026	
May	1	12 Aug - 14 Oct 2025	12 Feb 2026	▶ 12 - 18 May 2026	
Way		12 1 60 2020	19 - 23 May 2026		

3-PHASE LEARNING APPROACH

Our effective 3-phase Learning Approach, which builds your conceptual understanding, reinforces exam techniques, and tackles challenging topics, will be delivered online via live streaming on our e-learning platform. This flexible and efficient format works hand in hand with our proven methodology to ensure you are thoroughly prepared and confidently equipped to succeed in the CFA® Exam.

Phase 1 - Education

20 sessions (60 hrs) | Cantonese

Oct - Early Dec 2025: Online (Live Streaming with Catch-up Videos)

Enroll after Early Dec 2025: Online (Catch-up Videos)

- Addresses key concepts essential for the CFA® Program curriculum
- Provides exam-related tips and tricks

Learning Materials (Online)

- Education Program Slide Pack
- Pre-requisite Reading Course Notes (Level I only)
- 500+ Additional Practice Questions (Level I only) End-of-topic Q&A

Phase 2 - Revision

9 Sessions (27 hrs) | Cantonese

Mid Dec 2025 - Mid Jan 2026: Online (Live Streaming with Catch-up Videos)

Enroll after Mid Jan 2026: Online (Catch-up Videos)

- Concentrates on exam-taking strategies and techniques
- Intensive exercises drills with full debriefs
- Additional review of the most difficult and tricky concepts

Learning Materials (Online)

- Pre-requisite Reading Course Notes (Level I only)
- Revision Mind Maps Summarize key concepts at a glance
- **Revision Questions Book** Hundreds of exam-standard concept checkers

Phase 3 - Mock

Online Mock | 4.5 hrs

Mock Exam Review | 3 hrs | Cantonese | Online (Live Streaming)

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

Learning Materials (Online)

- Exam-standard Mock Exam Questions
- Personalized Performance Reports

ONLINE ACCESS & SUPPORTING SERVICES

Comprehensive online resources will be provided





You can contact our trainer by email after lessons to help you overcome any study issues

Online Pre-Course (Level I only)



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



Pre-requisite Reading Video (Level I only)

Videos cover the topic of Quantitative Methods, Financial Statement Analysis and Economic to help you understand the basic concepts

Live Streaming



Allows you to attend the class in real time anywhere at scheduled times



Online Catch-up Videos

All sessions are available to review on our eLearning platform



TRAINER'S PROFILE



- Over 17 years of experience teaching CFA Level I, II, and III
- Design, develop, and deliver financial training programs to top financial institutions and MNCs
- Frequent speaks on Fintech
- Expertise in investment tools, risk management, financial analysis, hedge funds, structured products, portfolio management, and wealth management
- Subject expert for CFA Level III essay questions
- Trainer of the first CFA Level III Essay Writing Workshop in Hong Kong
- Currently Risk Manager at VMS Investment Group. VMS's businesses include Private Equity, Venture Capital, Real Estate, Private Debt and Hedge Fund strategies
- Was COO at a Greater China value-focused hedge fund

Dr. Kyle Wong
PhD (Cornell), CFA, FRM

Demo Lecture





98% of our STUDENTS said

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

Student Testimonials

Cedric Lee

"I tried self-study before, but found it inefficient, so I joined the Kaplan CFA® Program. The curriculum was very systematic and exam-focused. Our teacher, Dr Kyle, was highly knowledgeable and always went straight to the point. He often used real-world examples to explain complex theories, which made the content much easier to understand."

Marcus Lo

"Kaplan not only strives for excellence in its course materials, but also offers a diverse selection of up-to-date topics aligned with current market trends and needs. It has provided me with a value-added service that I could not have received through self-study."

* Data from CFA® Program 2025 students evaluation.

STUDY JOURNEY

01 Enroll course

Enroll the course via Online Store.

https://store.kaplan.com.hk/cart/category/19



Receive Login Email 02



Login details will be sent out 7 working days before the course commencement date.

03 Download the Materials



You can download the notes from the eLearning platform and print them to fit your needs. These customized materials cover key topics that help you study efficiently.

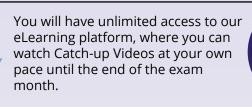


Start your online course **[]** 4



Enjoy live streaming learning on any device. Build up your knowledge through Education Program and refresh your understanding in Revision Course.

05 Unlimited Catch-up Videos*





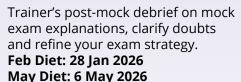
Online Mock Exam* ()



Online mock exam helps you identify strengths, tackle weaknesses and build confidence under timed conditions.

Feb Diet: 24 Jan 2026 May Diet: 2 May 2026

N7 Mock Exam Review*







[#] For the latest video upload schedule, please refer to the timetable and course dashboard in eLearning platform. Access will be expired at the end of the exam month.

^{*}Applicable to students enrolled in the Full Package only.

Enjoy the Best Deal Up to

17%

off

Feb/May Diet 2026 candidates

Discount Periods:

- 4 Sept 17 Nov 2025
- 5 Jan 31 Mar 2026

*Terms and Conditions apply.

Special Discount Offer

▶ Full Package: \$9,950

(Original Price: \$12,000)

Enroll in the Full Package to get the Schweser Essential Package for FREE (valued at \$5,700).

▶ Education Program ONLY: \$6,800

(Original Price: \$8,200)

Enroll in the Education Program to enjoy a discounted price of \$2,800 on the Schweser Essential Package

Revision Course ONLY: \$5,460

(Original Price: \$6,600)



Get HK\$1,000 up with friends together

Terms & Conditions apply.



Enroll via Online Store!

https://store.kaplan.com.hk/cart/category/19







CFA® LEVEL I - COURSE FEE (2026)

Revision Course Education Program Full Package only only (Education + Revision + Mock & Review) Improves curriculum Refreshes your curriculum Guides you from understanding after understanding by building knowledge building and on your current unsuccessful attempts. reinforcement to mock exams. knowledge. Medium: Cantonese Medium: Cantonese Medium: Cantonese **Discounted price** Applicable for: • 4 Sept – 17 Nov 2025 • 5 Jan – 31 Mar 2026 \$9,950 \$6,800 \$5,460 **Original price** \$12,000 \$8,200 \$6,600 **Education Program** (60 hrs) **Revision Course** (27 hrs) **Mock & Review** (7.5 hrs) Online pre-course (9 hrs) Add-on items (optional): **Schweser Essential** + \$2,800 Package (Value at \$5,700) **Print materials of** + \$1,200 SchweserNotes™ & + \$1,200 (on top of Schweser **OuickSheet Kit Essential Package)**

Why do you need the Schweser Package to achieve your exam goal?

Get Schweser's top tools for CFA® success! The Essential Package prepares you with more practice opportunities, such as module quizzes and topic quizzes, to help increase your content retention. Level up your prep with the essentials!

Study Package Highlights:



SchweserNotes™ & QuickSheet Kit

Breaks the curriculum into bite-sized segments for easier study, with summaries of key formulas, definitions, and concepts.



SchweserPro™ OBank

2,000+ foundational and exam-like questions, custom quizzes, tutorial videos with detailed answer explanations, and performance metrics.



Mock Exams (1-4) & Checkpoint Exams

Simulate the interface, format, and difficulty of the actual CFA® exam.

How to get started?



Enter the CFA® Program

Enrollment Requirements:

Have a bachelor's (or equivalent) degree



OR

Be an undergraduate student



OR

Carried out professional *work experience*Have a combination of *4,000 hours of work experience and/or higher education* that was acquired over a minimum of three sequential years^and achieved by the date of registering for the Level I exam. The dates of education and professional work experience cannot be overlapping.

A valid international travel passport is required to register.

^If applicable, assume 1,000 hours per year for higher education



Become a CFA® Charterholder

After passing all three exam levels, complete these steps to become a Charterholder:

- At least 4,000 hours of relevant experience, completed in a minimum of 36 months
- Submit 2-3 professional references
- Become a member of CFA Institute (USD299 membership fee for CFA Institute*)

*First year annual dues will be pro-rated for those joining CFA Institute and a member society for the first time.



FAQ

O1 Why do thousands pursue the CFA® CHARTER?

A: The CFA® charter is recognized globally as the gold standard in investment credentials. It connects you to a network of over 200,000 professionals and prepares you for key roles such as portfolio manager, risk manager, and research analyst.

Q2 What recognition do I receive after passing each level of the CFA® Program?

A: After passing each level of the CFA® Program, you will receive a new digital badge to showcase your achievement. You can also display your designation after your name on LinkedIn and X (Twitter), making it easy to highlight your progress and accomplishments to your professional network.

03 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 the lessons?

A: Yes, our most complete 3-phase learning strategy (Education + Revision + Mock Exam)—the Full Package—offers comprehensive preparation for the CFA® Program in Hong Kong. We help you build foundational concepts from the ground up, strengthen your exam techniques, and provide exam rehearsal.

Q4 How long should I prepare the exam?

A: The CFA® exam is challenging, the CFA Institute recommends a minimum of 300 hours of study time for each level. Rather than spending extra time trying to navigate the curriculum on your own, you can rely on a professional provider like Kaplan to help you study more efficiently. Our complete CFA® Program 3-Phase strategy (Education + Revision + Mock Exam) covers everything you need to maximize your study effectiveness. Typically, our program duration is 3 to 5 months to get you ready for exam day.

Q5 Which study solution is right for me?

A: Our Full Package is recommended if you want guidance throughout the entire learning process—from knowledge building (education) and knowledge reinforcement (revision) to taking mock exams that prepare you for exam-day success.

Education Program is recommended if you have previously studied the CFA® Program but wish to further strengthen your understanding of the curriculum and learn exam-related tips and techniques.

Revision Course is recommended if you already have a strong understanding of the curriculum but need to learn and/or refresh your knowledge.

06 What if I have questions after the lessons?

A: At Kaplan we are passionate about helping all students through their training. Our trainer is approachable and accessible for consultation through emails after lessons and help you overcome any study issues you encounter.

For more CFA® Exam details:

Hong Kong Office

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

Head Office in US

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

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.

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CFA LEVEL I - COURSE SCHEDULE

EDUCATION PROGRAM	60 hours	20 sessions
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	TRAINER >	ONLINE Live Streaming with Catch-up Videos KYLE WONG CANTONESE				
		DATE	DAY		TIME	
1	Quantitative Methods**	08/10/25	Wed	19:00	-	22:00
2	Quantitative Methods	12/10/25	Sun	10:00	-	13:00
3	Quantitative Methods + Online Progress Test Release	12/10/25	Sun	14:00	-	17:00
4	Financial Statement Analysis**	19/10/25	Sun	10:00	-	13:00
5	Financial Statement Analysis	19/10/25	Sun	14:00	-	17:00
6	Financial Statement Analysis	22/10/25	Wed	19:00	-	22:00
7	Financial Statement Analysis + Online Progress Test Release	26/10/25	Sun	10:00	-	13:00
8	Portfolio Management	26/10/25	Sun	14:00	-	17:00
9	Portfolio Management + Corporate Issuers	30/10/25	Thur	19:00	-	22:00
10	Corporate Issuers	02/11/25	Sun	10:00	-	13:00
11	Equity	02/11/25	Sun	14:00	-	17:00
12	Equity + Online Progress Test Release	05/11/25	Wed	19:00	-	22:00
13	Fixed Income	16/11/25	Sun	10:00	-	13:00
14	Fixed Income	16/11/25	Sun	14:00	-	17:00
15	Fixed Income	19/11/25	Wed	19:00	-	22:00
16	Derivatives	23/11/25	Sun	10:00	-	13:00
17	Derivatives + Alternative Investments + Online Progress Test Release	23/11/25	Sun	14:00	-	17:00
18	Economics**	30/11/25	Sun	10:00	-	13:00
19	Economics + Online Progress Test Release	30/11/25	Sun	14:00	-	17:00
20	Ethical and Professional Standards + Online Progress Test Release	03/12/25	Wed	19:00	-	22:00

REVISION COURSE 27 hours 9 sessions

		ONLINE Live Streaming with Catch-up Videos				
	TRAINER >	KYLE WONG				
			CANTONE	SE		
		DATE DAY TIME				
1	Quantitative Methods**	10/12/25	Wed	19:00	-	22:00
2	Financial Statement Analysis**	14/12/25	Sun	10:00	-	13:00
3	Financial Statement Analysis	14/12/25	Sun	14:00	-	17:00
4	Portfolio Management + Corporate Issuers	28/12/25	Sun	10:00	-	13:00
5	Corporate Issuers + Alternative Investments	28/12/25	Sun	14:00	-	17:00
6	Equity	04/01/26	Sun	10:00	-	13:00
7	Fixed Income	04/01/26	Sun	14:00	-	17:00
8	Derivative Investments + Economics**	18/01/26	Sun	10:00	-	13:00
9	Economics + Ethical and Professional Standards	18/01/26	Sun	14:00	-	17:00

ONLINE MOCK

4.5 hours

DATE	DAY	TIME
24/1/2026	Sat	10:00 - 12:15 & 12:45 - 15:00

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

MOCK EXAM REVIEW

3 hours

	ONLINE Live Streaming with Catch-up Videos					
TRAINER >	> KYLE WONG					
		CANTONE	SE			
	DATE	DAY		TIME		
	28/01/26	Wed	19:00	-	22:00	