

# THE CIPM<sup>®</sup> DESIGNATION

Gain the skills to drive smarter, more effective investment decisions and maximize investors' value.

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Trust, transparency, and analytical expertise are essential if today's markets are to function at their best. As a result, professionals who can demonstrate mastery of the balance of skills needed for evaluating performance and risk, finding actionable insights from investment decisions, and communicating performance effectively are in high demand.



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## WHAT IS CIPM?

The only credential of its kind, the CIPM program leverages the global expertise of CFA Institute, the respected global leader in investment education and ethics, to deliver practice-based approaches and skills for effective investment performance and risk evaluation, manager selection, and investment reports steeped in accountability.

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## WHAT DOES IT COVER?

The CIPM curriculum is based on an advanced body of knowledge that is continuously reviewed and updated by more than 1,000 active investment practitioners around the world to ensure that it reflects the most relevant trends and the core competencies most needed by today's top investment employers.

### Performance and Risk Evaluation (70%)

- Measurement
- Attribution
- Appraisal
- Manager Selection

### Ethical and Professional Standards (30%)

- Investment performance and reporting standards
- Ethics

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## WHO IS IT FOR?

- Financial advisors/planners
- Investment performance analysts
- Investment consultants
- Portfolio managers
- Client relationship managers
- Marketing managers
- Portfolio accountants
- Compliance officers
- Risk managers

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## HOW CAN IT HELP YOU?

### Increase your practical expertise to stay competitive

- Learn to spot actionable analytical information.
- Understand how to thoroughly evaluate investment managers.
- Keep pace with the industry's latest performance evaluation and presentation skills.
- Gain applicable knowledge and skills demanded by the industry.
- Access support, tools, and resources to stay current throughout your career.

### Earn recognition for influencing decisions

- Position yourself as an expert to deliver actionable insights that shape decision making.
- Better articulate and communicate performance information to colleagues and clients.
- Build credibility and trust with clear and complete reporting skills.
- Leverage the recognition and respect for CIPM across the industry and around the world.

### Gain a reputation for accountability

- Demonstrate a commitment to professional ethics and transparency.
- Build trust by using globally comparable and consistent metrics.
- Better meet fiduciary responsibilities with improved risk practices.
- Deepen client and colleague relations with insightful and transparent communications.

### Improve performance to build your business

- Increase operational efficiency and translate evaluation insights into action.
- Select fund managers with consistently superior performance traits.
- Exceed client expectations with more transparent and insightful communications.
- With a trusted reputation and demonstrable results, attract new and retain existing clients.

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## INTERESTED?

Learn more and register at [www.cfainstitute.org/programs/cipm](http://www.cfainstitute.org/programs/cipm).