

Advanced Private Equity Certificate



About this certificate

The Advanced Private Equity Certificate is designed for private equity professionals seeking tools and strategies for successful investment management and partnership governance. Building on the intermediate knowledge and skills provided in the Private Equity Certificate, this advanced program focuses on refining skills in areas such as comprehensive due diligence, sophisticated deal sourcing, advanced financial modeling, debt valuation, and strategic communication.

The syllabus was developed in partnership with industry experts, ensuring the content reflects current practices and conventions in private equity. It also incorporates rigorous financial modeling assignments from Financial Edge, a highly reputed firm in the private equity sector.

Prerequisite: Private Equity Certificate

Important Note

The Advanced Private Equity Certificate requires participants to have successfully completed the intermediate Private Equity Certificate.

This prerequisite ensures that all certificate registrants have a robust intermediate understanding of private equity concepts, techniques, and industry practices upon which this advanced course will build.

The Private Equity Certificate equips you with essential skills such as deal structuring, valuation techniques, portfolio monitoring, and more, preparing you for the more sophisticated challenges tackled in the Advanced Private Equity Certificate.

Learning Experience

Learners will progress through four self-paced courses, each designed to equip them with in-depth knowledge and practical skills in advanced private equity practices:



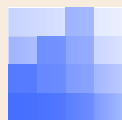
Advanced GP Toolkit Modules

- Understanding Target Companies
- Deal Sourcing, Evaluation, and Execution
- Operational and Financial Management
- Strategic Communication and Crisis Management



Advanced Private Debt Valuation Techniques Modules

- Advanced Private Debt Valuation Models
- Valuing Private Debt with Embedded Options
- Valuing Distressed Private Debt



Advanced Financial Modeling Modules

- Scenario Analysis and Updating Models for Results
- Further Applications in Financial Modeling
- Advanced LBO Modeling and Complexities



LP Perspectives Modules

- Evaluating General Partners (LP Perspective)
- Integrating ESG Considerations
- Portfolio Construction, Risk, and Liquidity Management

Who should enroll?

The certificate is ideal for experienced professionals seeking to transition to or within the private equity space, including:

- Anyone who has completed the Private Equity Certificate
- Professionals working in private equity who want to upskill to Associate
- Those working in other professional roles, such as accountants and lawyers, who want to transition to private equity
- Relationship managers, either in institutional or private wealth who want a deeper understanding of the workings of private equity
- Anyone aspiring to work in the industry who can commit to professional level study
- Graduate students aspiring to enter the private equity industry

Learn more by visiting www.cfainstitute.org/programs/private-markets.

Further info on the Advanced Private Equity Certificate coming early 2025.

 CFA Institute®

CERTIFICATE

**Advanced Private
Equity Certificate**

At a glance

USD 890
(USD 712 for members)

Registration opens
April 2025
Courses begin August 2025

Up to **100 hours** to
complete with 12-month
access to downloadable
course content

Online courses and
final assessment with
live office hours support

**Certificate and digital
badge** from globally
recognized CFA Institute