

THE PEAK INTERNATIONAL CERTIFICATION FOR INVESTMENT MANAGEMENT PROFESSIONALS

WHAT IS CIMA CERTIFICATION?

Certified Investment Management Analyst[®] (CIMA[®]) is the premier certification for financial advisors and investment consultants and one of the only professional certifications in financial services to meet international accreditation and quality standards.

The CIMA Certification requires advisors to meet rigorous standards:

- **Experience:** At least three years of relevant financial services experience and a clean regulatory record
- **Ethics:** Comply with the Institute *Code of Professional Responsibility* or lose the certification
- **Education:** Complete executive education at a top 25 global business school
- **Exam:** Pass a stringent five-hour examination
- **Continuing Competency:** Stay updated on industry trends, laws, and products with 40 hours of continuing education every two years, including two hours of ethics education

By learning and applying sophisticated technical investment knowledge in their practices, CIMA professionals provide high-quality investment management advice most valued by investors.*

*Investments & Wealth Client Research, Absolute Engagement, 2017

Knowledge Domains

Fundamentals:

Statistics and methods
Applied finance
Economics
Global capital markets

Investments:

Vehicles
Equity
Fixed income
Alternative investments
Options/futures
Real assets

Portfolio Theory and Behavioral Finance:

Portfolio theories and models
Behavioral finance theory
Investment philosophies and styles
Tools and strategies

Risk and Return:

Attributes of risk
Risk measurements
Performance measurement
and attribution

Portfolio Construction and Consulting Process:

Ethics
Client discovery
Investment policy
Portfolio construction
Manager search and selection
Portfolio review and revisions

