

CFA Institute Launches Private Markets and Alternative Investments Certificate

[MELBOURNE, AUSTRALIA] 18 September, 2023 – CFA Institute, the global association of investment professionals, has launched a Private Markets and Alternative Investments Certificate. Built on globally recognised CFA Program content, the certificate is available to Australian investment professionals and provides foundational-level knowledge across alternative investments, which are gaining importance in portfolios.

The Private Markets and Alternative Investments Certificate will be available to Australians and is suitable for new entrants to the industry who aspire to work for a General Partner (GP) firm or other alternatives specialist, existing investors or asset owners who seek to allocate investments to private markets or alternative investments, and consultants working with General Partner or Limited Partner firms who wish to understand the investment landscape and industry terminology for the benefit of their clients.

The Certificate is a five-course, self-paced online program with a foundational curriculum that is enhanced with additional practitioner insights and perspectives. It equips learners with essential knowledge on private equity, private credit, real estate, infrastructure, commodities, and hedge funds.

The five courses are:

- Course 1: Introduction to Private Markets and Alternative Investments
- Course 2: Private Equity and Private Credit Investments
- Course 3: Real Estate and Infrastructure Investments
- Course 4: Commodities and Natural Resources Investments
- Course 5: Hedge Fund Investments

Richard Fernand, Head of Certificate Management at CFA Institute said: “The investment landscape is constantly changing, and CFA Institute recognises the importance of adapting to the needs of a dynamic and diverse investment profession and client needs. The development of the Private Markets and Alternative Investments Certificate acknowledges both this increasingly important investment specialism and the demands of candidates as they pursue a career in the alternatives industry. This certificate, together with the release of the CFA Program LIII Private Markets Pathway, demonstrates CFA Institute’s commitment to developing high quality educational opportunities in the alternatives space.

“The Private Markets and Alternative Investments Certificate offers strong foundational learning and practical content providing candidates with increased confidence and enhanced credibility. We plan in the near future to release more advanced certificates that will provide learners with more advanced skills. The course aims to develop a learner’s ability to think critically, ask insightful questions, and innovate within the private markets and alternative investments space, introducing foundational concepts, tools, and techniques needed to open doors, further their careers, and benefit clients.”

Lisa Carroll, CEO of CFA Societies Australia, said Australian investment professionals will be able to undertake the online program with enrolments available, and would greatly benefit from the five courses given the rising importance of alternative assets in institutional investors' portfolios.

“With the growing importance of alternative assets, particularly in the portfolios of Australian superannuation funds, this course will provide essential training for financial professionals who are working, or interested in working, in private markets and alternative investments. This certificate will

allow them to gain a broader understanding of the broad range of alternative assets and their benefit for investors' portfolios," Carroll said.

All coursework can be completed online. For the full Private Markets and Alternative Investments Certificate details and course descriptions, please visit the CFA Institute website [here](#).

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Notes to Editors:

About CFA Institute

CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion of ethical behavior in investment markets and a respected source of knowledge in the global financial community. Our aim is to create an environment where investors' interests come first, markets function at their best, and economies grow. There are more than 190,000 CFA charterholders worldwide in more than 160 markets. CFA Institute has nine offices worldwide and 160 local societies. For more information, visit www.cfainstitute.org or follow us on LinkedIn and Twitter at @CFAINstitute.

About CFA Societies Australia

CFA Societies Australia is part of the worldwide network of CFA Institute member societies that lead the investment profession globally by promoting the highest standards of ethics, education and professional excellence for the ultimate benefit of society. CFA Societies Australia represents the interests of over 3500 investment professionals through advocacy, education, events, and professional development. For more information visit www.cfas.org.au, or follow us on Twitter at @CFASocietiesAus, Facebook at facebook.com/CFASocietiesAus or on LinkedIn.

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